Core Training
Back Office User Manual

Version 2.0

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Changes from Previous Version

Topic	Change	Page Number
1) Upgrade	New functionality following upgrade from version 16 to version 19.	n/a
i. Portal Notification Months	Notifications to employees via Portal a given number of months prior to repeat training or a continuation course falling due.	13
ii. Deactivate Portal Waiting List	Remove ability for staff to request to be placed on a waiting list.	15
iii. Course Booking Exclusions	Defines groups of staff to be excluded from booking a course via Portal based on a rules matrix.	26
2) Course Codes Naming Convention	Additional guidance on how to ascertain the next course code in the sequence according to the pre-defined naming convention.	10
3) Find Person	Guidance on searching for a candidate using the Find Person functionality.	50

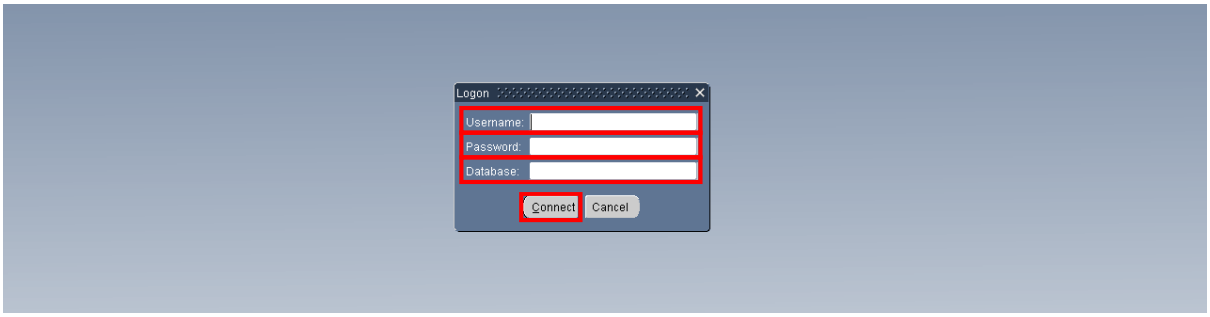
Introduction

Introduction

Logging In

1) Open your web browser and navigate to the web address below. The log in screen displays.

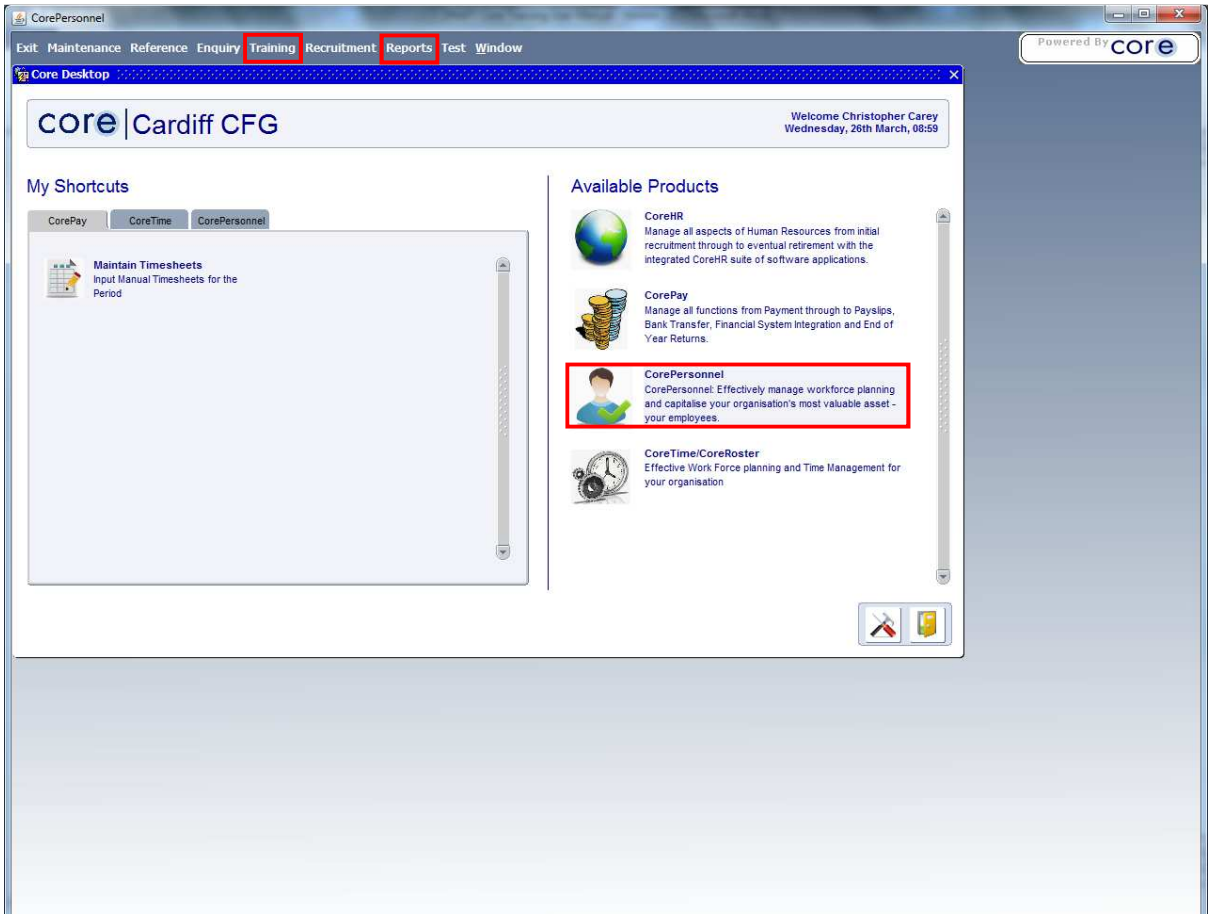
https://pobladmin.cardiff.ac.uk/forms/frmservlet?config=live



2) Enter your username and password where prompted to do so and enter **corehr** in the Database field.

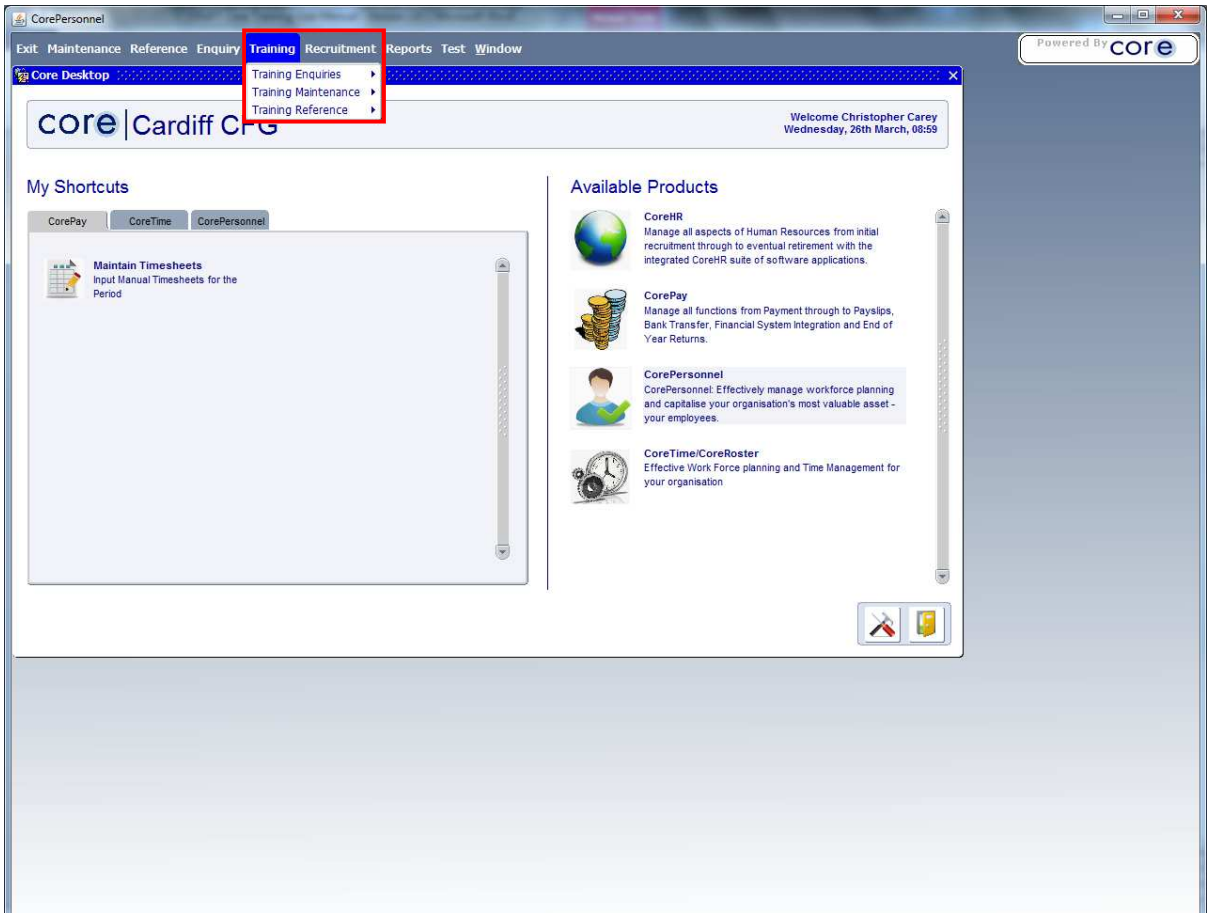
3) Click **Connect**. The **Core Desktop** screen displays.

4) Click **CorePersonnel** from the list of Available Products. The **Training** and **Reports** menus display in the main menu at the top of the screen.


CorePersonnel
Exit Maintenance Reference Enquiry Training Recruitment Reports Test Window
Powered By core
Core Desktop
core | Cardiff CFG
Welcome Christopher Carey
Wednesday, 26th March, 08:59
My Shortcuts
CorePay
CoreTime
CorePersonnel
Maintain Timesheets
Input Manual Timesheets for the Period
Available Products
CoreHR
Manage all aspects of Human Resources from initial recruitment through to eventual retirement with the integrated CoreHR suite of software applications.
CorePay
Manage all functions from Payment through to Payslips, Bank Transfer, Financial System Integration and End of Year Returns.
CorePersonnel
CorePersonnel: Effectively manage workforce planning and capitalise your organisation's most valuable asset - your employees.
CoreTime/CoreRoster
Effective Work Force planning and Time Management for your organisation

Getting Orientated

The Core Training module is accessed via the main menu from the CorePersonnel application.


CorePersonnel
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Manage all functions from Payment through to Payslips, Bank Transfer, Financial System Integration and End of Year Returns.
CorePersonnel
CorePersonnel: Effectively manage workforce planning and capitalise your organisation's most valuable asset - your employees.
CoreTime/CoreRoster
Effective Work Force planning and Time Management for your organisation

The Core Training module consists of 3 sub-menus: Training Enquiries, Training Maintenance and Training Reference.

Training Enquiries	Allows the user to view training details relating to courses, events and individual training records but typically does not allow the user to create or change records - it is read only (see page 92).
Training Maintenance	Allows the creation or editing of new or modified training details relating to courses, events and individual training records.
Training Reference	Allows the user to edit reference data. Typically users will have access to 2 Training Reference sub-menus, Curriculum Codes and Question Category Codes. Curriculum Codes can be used in the creation of a Skills/ Training Matrix (see page 85). Question Category Codes are used in the creation of evaluation questionnaires (see page 53).

In addition to the Training menu you will also have access to a Reports menu which includes a range of Training Reports (see page 113).

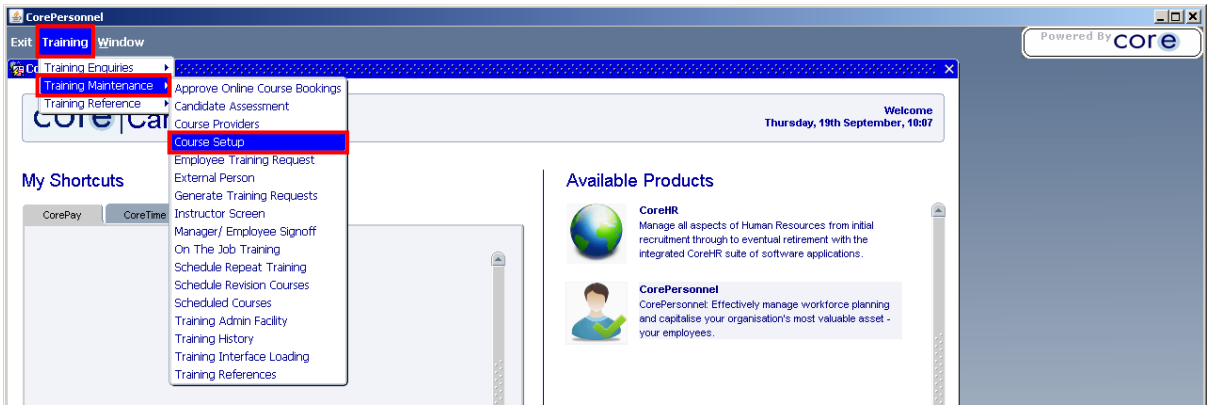
Scheduled Courses

Scheduled Courses

Scheduled training is appropriate for the vast majority of development activities. It typically relate to training delivered within a classroom environment although it is not limited to that. Scheduled training is opposed to On The Job training which relates to training delivered within the context of the everyday working environment (see page 102).

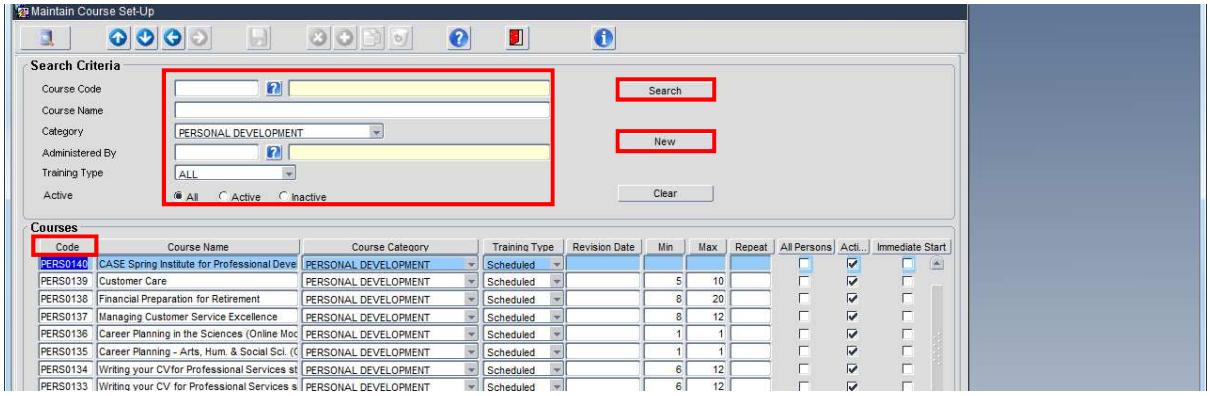
Setup Course Details

1) Select **Training** → **Training Maintenance** → **Course Setup**. The **Maintain Course Setup** selection screen displays.



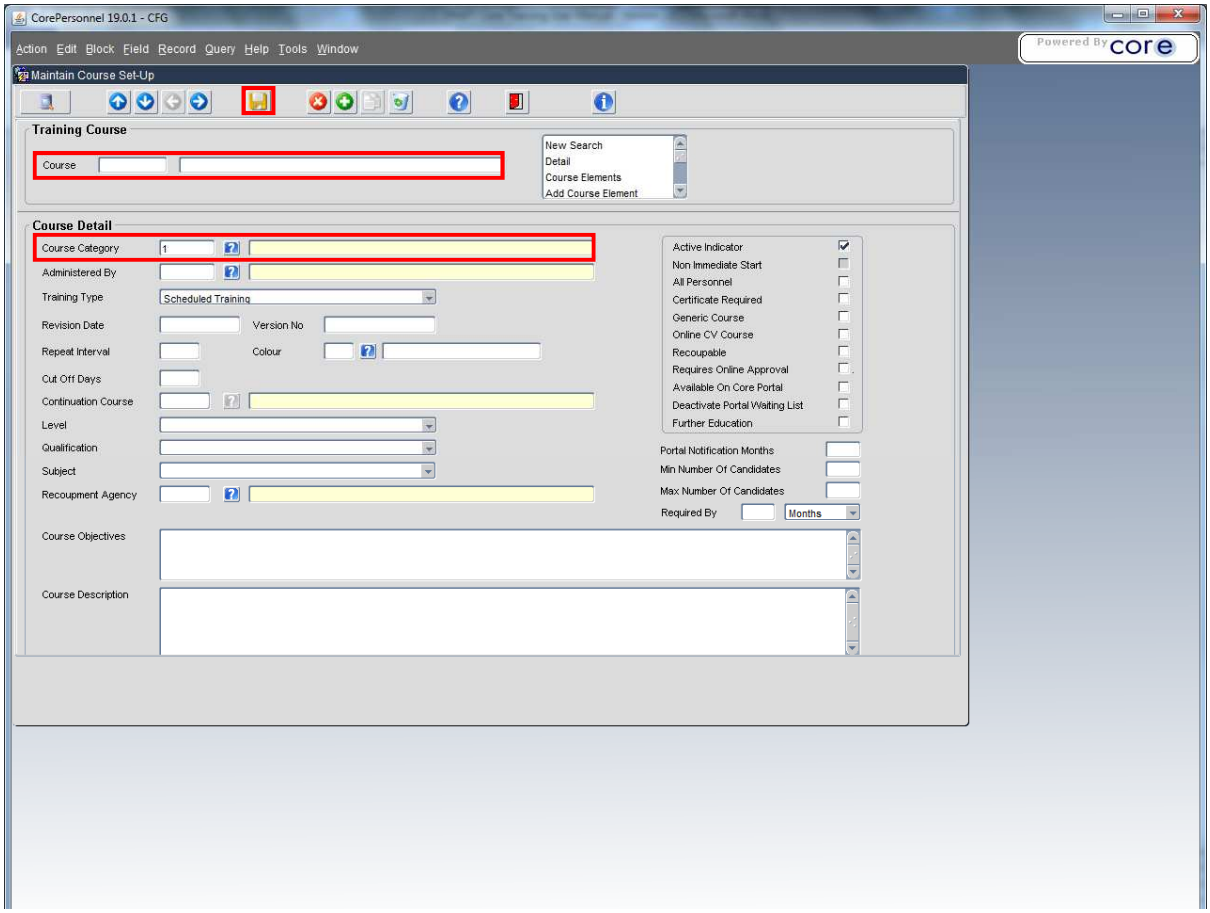
2) To ensure the course you want to create has not been created previously, search for the course by entering appropriate search criteria and clicking **Search**. The Active indicator should always be set to **All** to ensure that you search both active and inactive courses. A list of course which match your search criteria display in the **Courses** table.

3) If creating a new course, search for all courses within the Course Category that best describes the nature of the course you wish to create. To sort the courses which match your search criteria in order of course code, click on the button at the top of the Code column in the courses table. Use the next alphanumeric code in the sequence as your new course code.



4) Assuming the course you want to create has not been created previously, click the **New** button to enter details for a new course. The **Maintain Course Set-Up** screen displays. If the course already exists you should edit the existing course rather than create a new one.

5) Complete all relevant fields within the Maintain Course Set-Up screen as required. Course Code, Description and Course Category are mandatory fields.



i. Course Code — An alphanumeric code of up to 8 characters. It is recommended that the Course Code comprise of the 1st 4 characters of the Course Category followed by a 4 digit number (e.g. PERS0001 for the 1st course to be created using the Personal Development course category). All existing course codes for each category can be viewed by searching by Category on the Maintain Course Set-up selection screen (see page 10).

ii. Description — The course title.

iii.	Course Category	The broad theme of the course (e.g. Personal Development). Should be the same as that used to define the first 4 characters of the Course Code.
iv.	Administered By	The Department responsible for providing/ arranging the course.
v.	Training Type	Distinguishes between Scheduled Training and On The Job Training. In most circumstances Scheduled Training will be appropriate. See page 102 for On the Job Training.
vi.	Revision Date	The date the course was changed, if appropriate. To be used when amending details of an existing course.
vii.	Version Number	The iteration of the course, if appropriate. To be used when amending details of an existing course.
viii.	Repeat Interval	The period in months after which a training request should be generated so that the candidate completes the same course again (e.g. an annual First Aid at Work Refresher course may have a repeat interval of 12 months to enable candidates attending the course to maintain their First Aider status).
ix.	Colour	Determines the colour used to mark the course entry in the Training Calendar. It is recommended that colour 7 – Red be used for all training courses.
x.	Cut Off Days	The number of days prior to an event start date within which period employees and managers are prevented from cancelling a training request via Portal. A 7 day cut off period is recommended as a University standard.
xi.	Continuation Course	A course which candidates may wish to consider following completion of this course as the next step in their development. This

		can be selected against previously created courses.
xii.	Level	Level of the course if leading to a qualification (e.g. OTHER POSTGRADUATE QUALIFICATION) (see page 79).
xiii.	Qualification	Each course can be linked to a qualification. When a candidate is recorded as having passed the course an education record is automatically generated for this qualification in the Qualifications module (e.g. oth Pg Qual) (see page 79).
xiv.	Subject	Subject of the course if leading to a qualification (see page 79).
xv.	Recoupment Agency	The external organisation from which the costs of running the course will be recovered, if appropriate.
xvi.	Course Objectives	Intended learning outcomes.
xvii.	Course Description	What the course involves.
xviii.	Portal Notification Months	A notification is displayed in the Courses Pending section of Portal such that the employee is reminded of the need to book a course where a repeat interval or continuation course has been defined. For example, where the repeat interval is 12 months and the Portal Notification Months is 2 months, staff will be notified in Portal when they are within 2 months of the repeat due date.
xix.	Min Number Of Candidates	The minimum number of candidates required to run the course. This can be varied later when creating each new event of the course (see page 35).
xx.	Max Number Of Candidates	The maximum number of candidates that can attend the course. This can be varied later when creating each new event of the course (see page 35).

xxi.	Required By	A number of days/ weeks/ months/ years can be set for the course to be required by.
xxii.	Indicators	
	a. Active Indicator	The course is currently available.
	b. Non Immediate Start	Selected when creating an On the Job course.
	c. All Personnel	Enables training requests to be generated for all staff to complete the course. Caution is advised when considering the use of this indicator.
	d. Certificate Required	Certificate required for this course.
	e. Generic Course	Enables a generic course to be created (e.g. Conferences). A specific event can then be created for each conference attended without having to create a new course each time.
	f. Online CV Course	Allows configuration for an online CV course.
	g. Recoupable	Indicates whether costs for a course are recoupable.
	h. Requires Online Approval	For courses which require line manager authorisation of training requests. It is recommended that this be selected as standard for all courses unless there is an objective justification as to why this shouldn't be the case.
	i. Available On Core Portal	Course available for staff or their managers to request via Portal. It is recommended that this be selected as standard for all courses unless there is an objective justification as to why this shouldn't be the case.

j.	Deactivate Portal Waiting List	Removes the functionality in CorePortal enabling staff to request to be placed on the waiting list. Staff must request to attend a specific event.
k.	Further Education	Switching on this indicator changes the layout of the Employee Training Request screen. Different details regarding further education can be recorded.

6) Click **Save** .

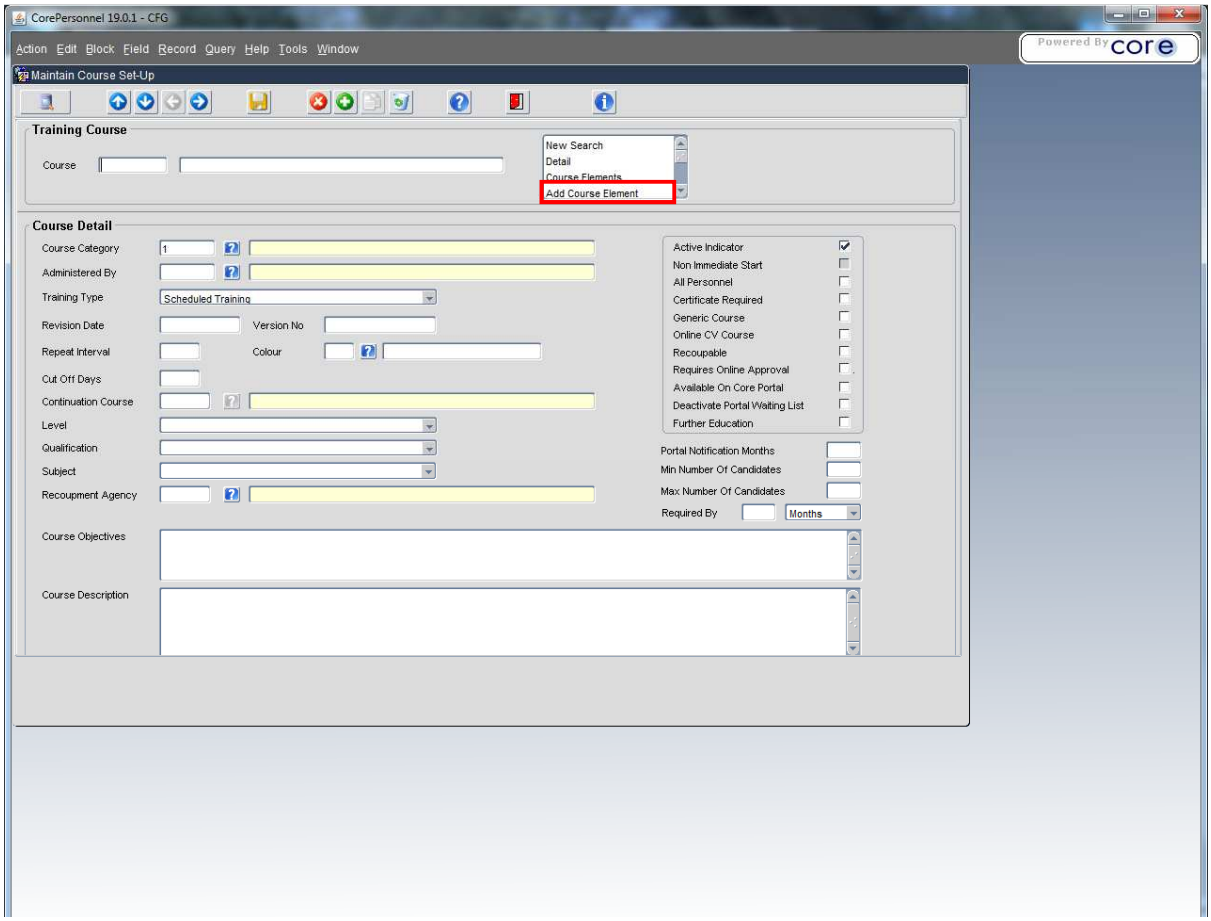
7) Click the **Exit** button on the toolbar to return to the main menu.

Course Elements

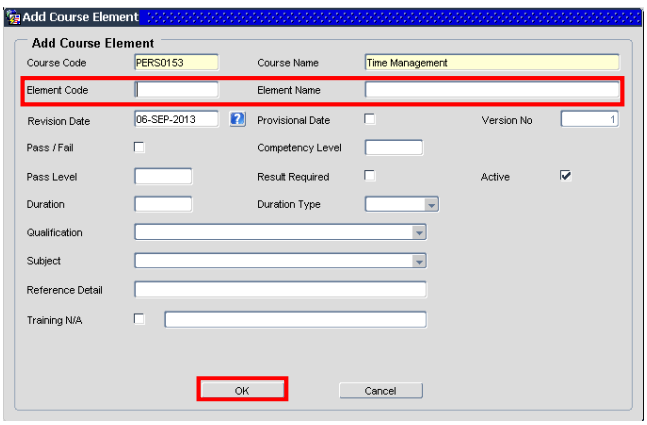
Course elements can be added to a course where the course comprises a number of modules.

Add Course Elements

1) Select **Add Course Elements** from the Select Detail menu on the Maintain Course Set-Up screen. The **Add Course Element** screen displays.

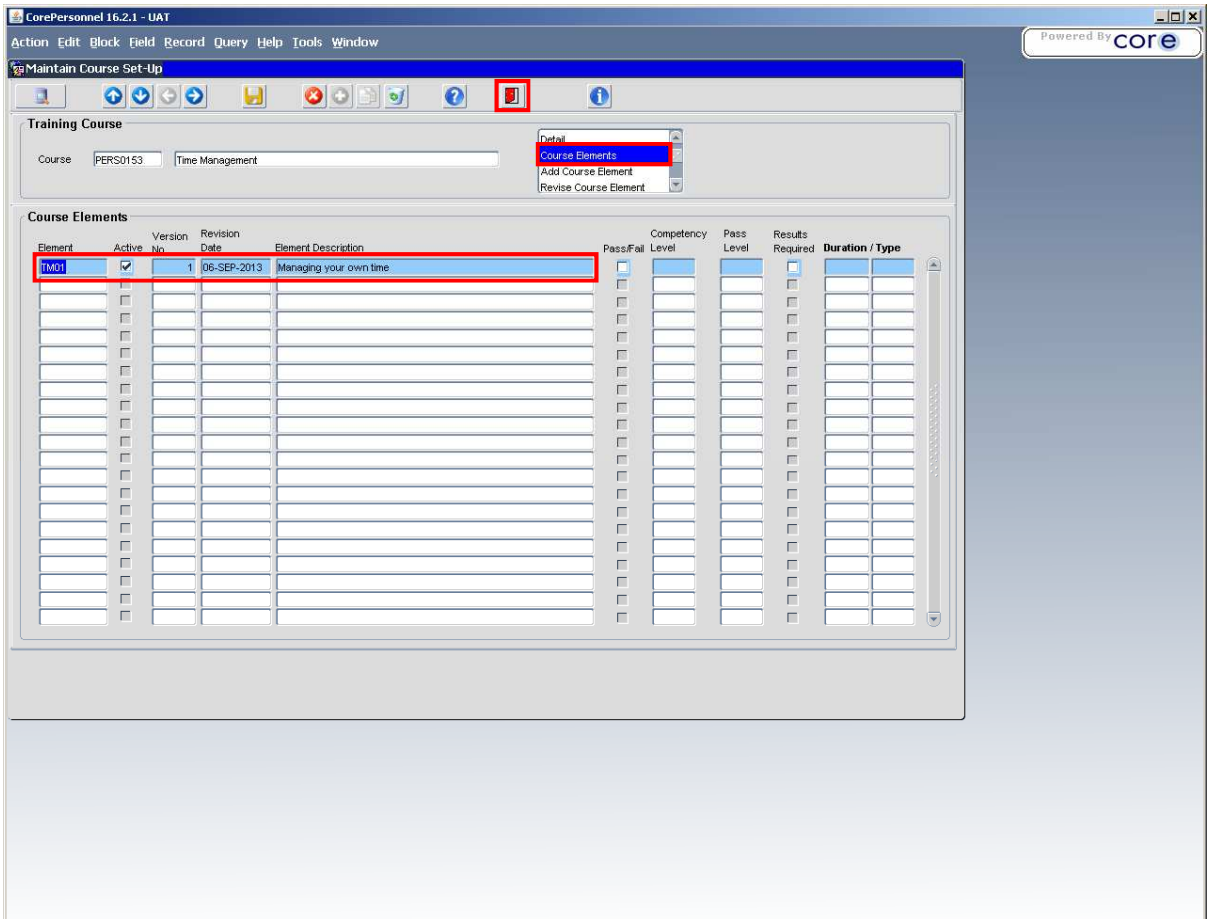


2) Complete all relevant fields within the Add Course Element screen as required. Element Code and Element Name are mandatory fields.



i.	Element Code	A unique code to distinguish the elements from any others which may be associated with the course.
ii.	Element Name	The title of the module.
iii.	Revision Date	The date the module was amended, if appropriate.
iv.	Provisional Date	A provisional date can be set for the course element.
v.	Version Number	The iteration of the module, if appropriate.
vi.	Pass / Fail	Indicator to identify whether the element carries a pass/ fail decision.
vii.	Competency Level	Where exam scores are recorded, the competency level is the maximum score for the exam. The alternative to exam scores is the pass/ fail indicator.
viii.	Pass Level	Where exam scores are recorded, this score indicates the pass level for the exam. The alternative to exam scores is the pass/ fail indicator.
ix.	Result Required	A warning will be displayed in the Candidate Exam Results Screen if results are not entered for a candidate(s).
x.	Active	The element currently comprises part of the course.
xi.	Duration	Identifies the duration of the element.
xii.	Duration Type	Identifies whether the duration is in days/ weeks/ months/ years.
xiii.	Qualification	A qualification can be set against the course element.
xiv.	Subject	A subject can be set against the course element.
xv.	Reference Detail	Free text field available.
xvi.	Training N/A	

3) Click the **OK** button to accept details. The Add Course Element screen closes and the new element displays in the **Course Elements** screen.

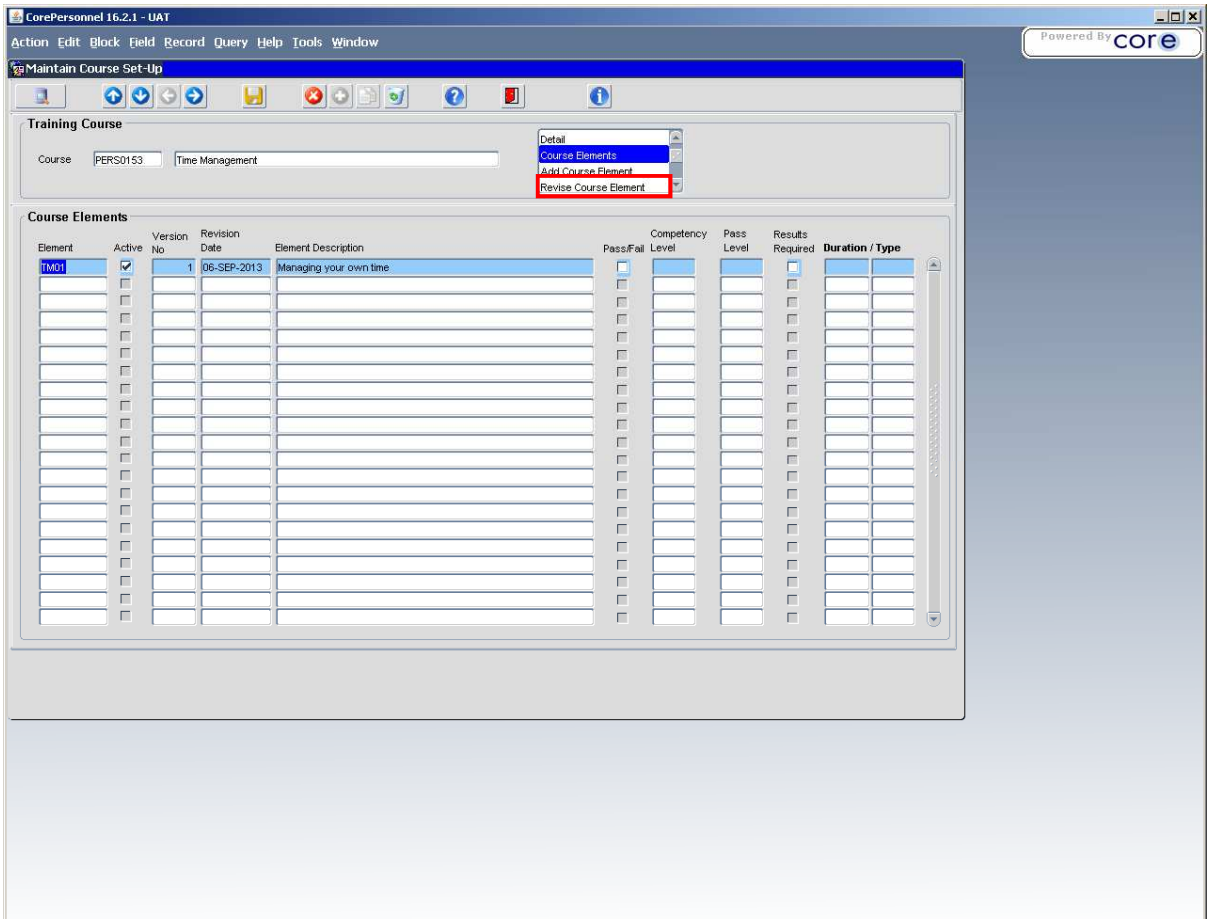


4) To add another element select **Add Course Element** from the Select Detail menu and follow instructions 2 and 3 above. Alternatively, click the **Exit** button on the toolbar to return to the main menu.

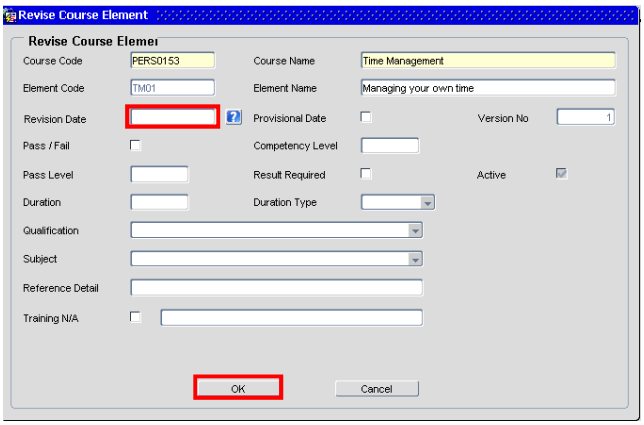
Revise Course Elements

1) Click on the course element you wish to revise in the Course Elements table such that it is highlighted blue.

2) Select **Revise Course Element** from the Select Detail menu on the Maintain Course Set-Up screen. The **Revise Course Element** screen displays.


CorePersonnel 16.2.1 - UAT
Action Edit Block Field Record Query Help Tools Window
Powered By core
Maintain Course Set-Up
Training Course
Course PERS0153 Time Management
Detail
Course Elements
Add Course Element
Revise Course Element
Course Elements
Element Active Version No Revision Date Element Description Pass/Fail Competency Level Pass Level Results Required Duration / Type
TM01 1 06-SEP-2013 Managing your own time

3) Amend the fields in the Revise Course Element screen you wish to change.



4) Enter a **Revision Date** (i.e. the date from which the element was/ is to be changed).

5) Click **OK**. The Revise Course Element screen closes and the revised element displays in the **Course Elements** screen.

6) Click the **Exit** button on the toolbar to return to the main menu.

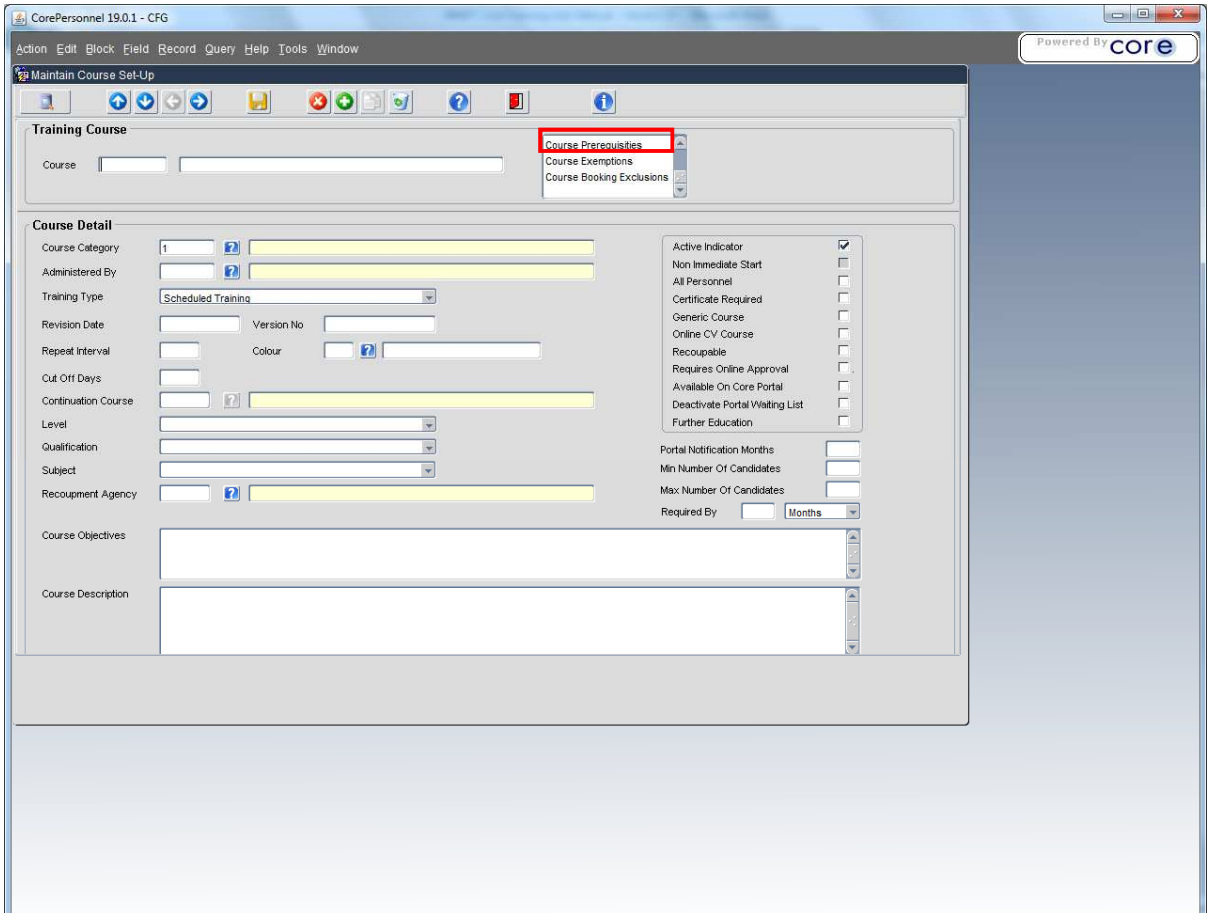
Pre-requisites

A pre-requisite is where a candidate is expected to have a specified status on another course (e.g. completed or scheduled to attend another course) before requesting to attend the course that the pre-requisite applies to. Pre-requisites can be defined for a course such that a warning message is displayed to administrators when adding a candidate who does not meet the pre-requisite, but where the administrator can override this pre-requisite, or such that the administrator is prevented from adding a candidate to a course unless the pre-requisite has been met.

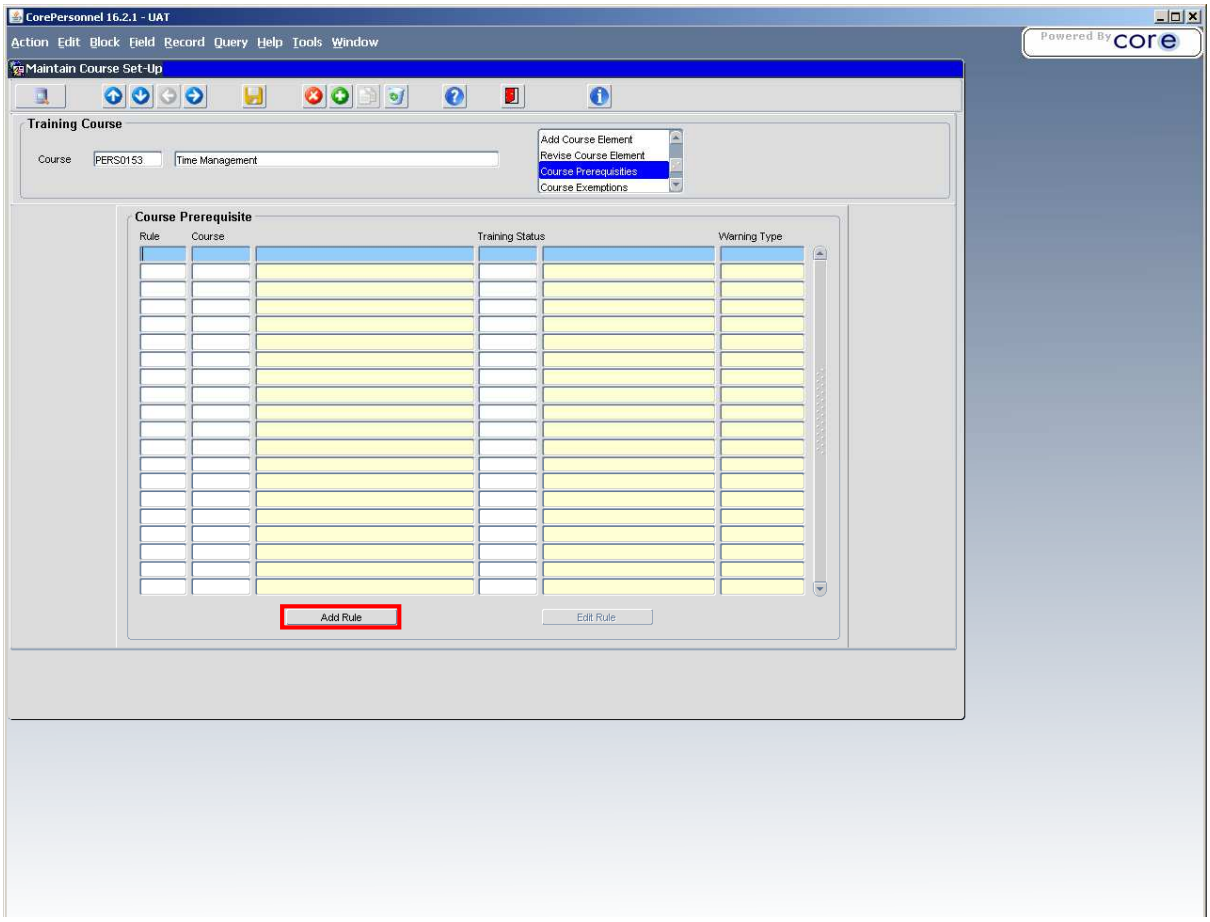
It is not possible to define a pre-requisite based on other criteria such as a competency level (e.g. basic IT literacy required for attendance on a Microsoft Access training course). Where pre-requisites such as these are required they should be clearly stated in the course description.

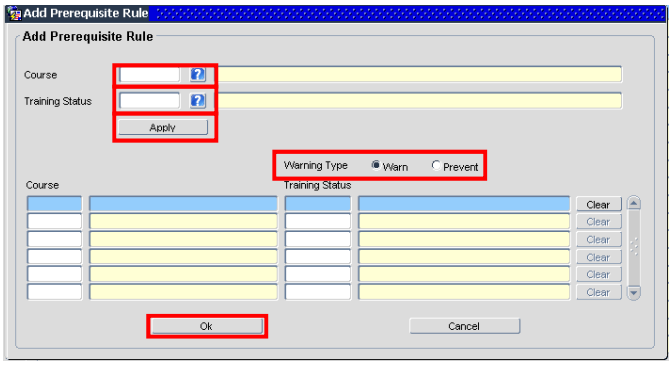
Set up a Pre-requisite

1) Select **Course Prerequisites** from the Select Detail menu on the Maintain Course Set-Up screen. The **Course Prerequisite** screen displays.



2) Click **Add Rule**. The **Add Prerequisite Rule** screen displays.





3) Select the Course you wish to create a pre-requisite rule for by clicking the valid values button to display a list of courses.

4) Select the Training Status (e.g. Completed) you wish to use as the basis for your pre-requisite rule by clicking the valid values button to display a list of options.

5) Define a Warning Type by selecting either the **Warn** or **Prevent** radio buttons. The warning type defaults to Warn. When a candidate is selected to sit the selected course, a warning message will display stating that they have not met the pre-requisite. This warning message can be overridden if appropriate. If the Prevent radio button is selected a candidate will not be able to be scheduled a place on the course unless they have satisfied the pre-requisite rule.

6) Click **Apply**. The pre-requisite rule is displayed in the table.

7) Repeat instructions 3 to 6 above to apply additional pre-requisite rules if needed.

7) Click **OK**. The Add Prerequisite Rule screen closes and the new pre-requisite displays in the **Course Prerequisites** screen.

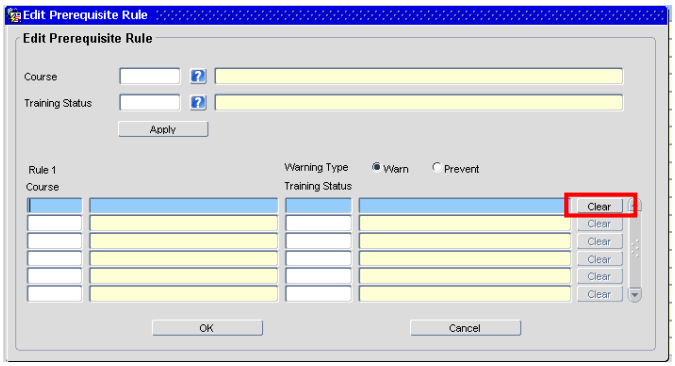
8) Click the **Exit** button on the toolbar to return to the main menu.

Edit a Pre-requisite

1) Click on the rule in the **Course Pre-requisites** screen you wish to edit such that it is highlighted blue.

2) Click **Edit Rule**. The **Edit Prerequisite Rule** screen displays.

3) Click **Clear** to delete the pre-requisite you wish to edit. Repeat instructions 3 to 8 above to define the revised pre-requisite rule.

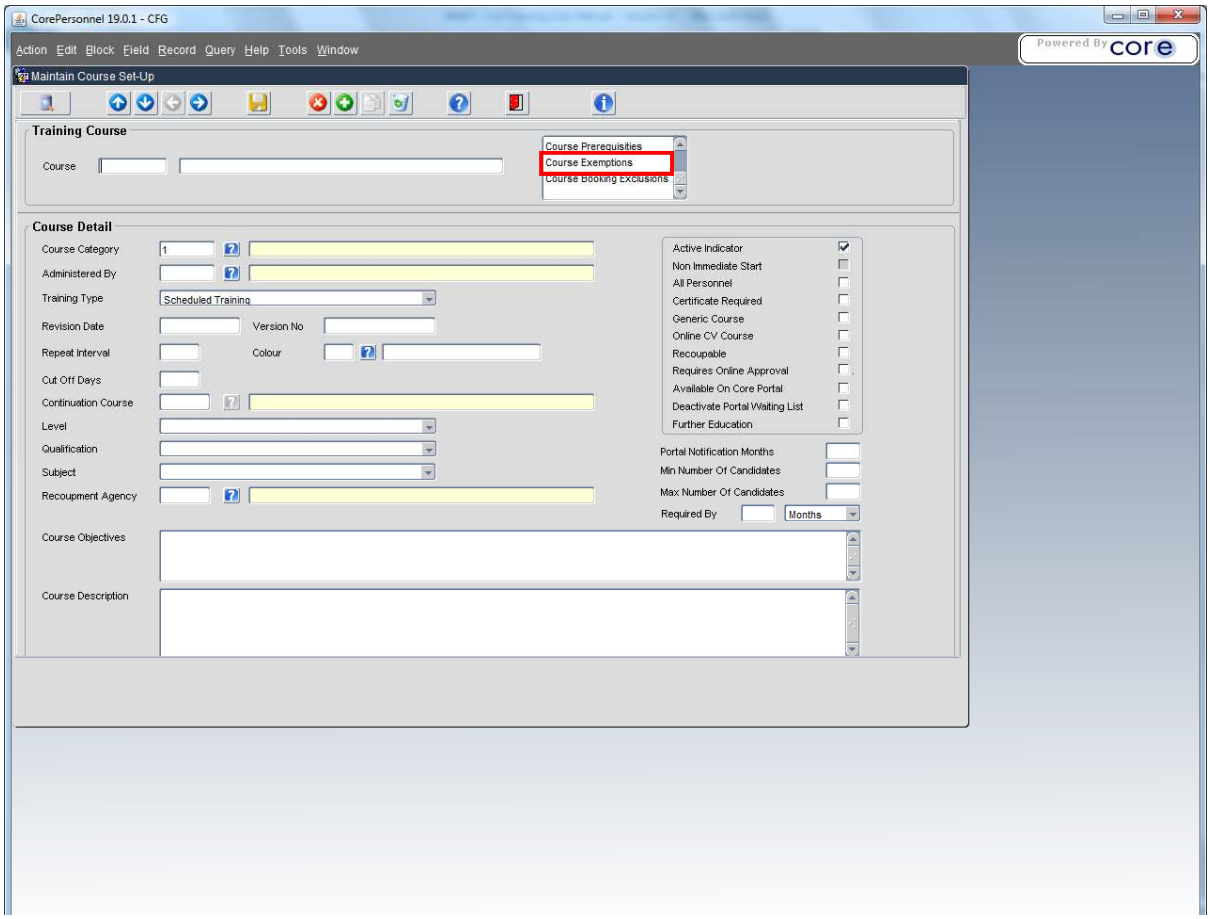


Exemptions

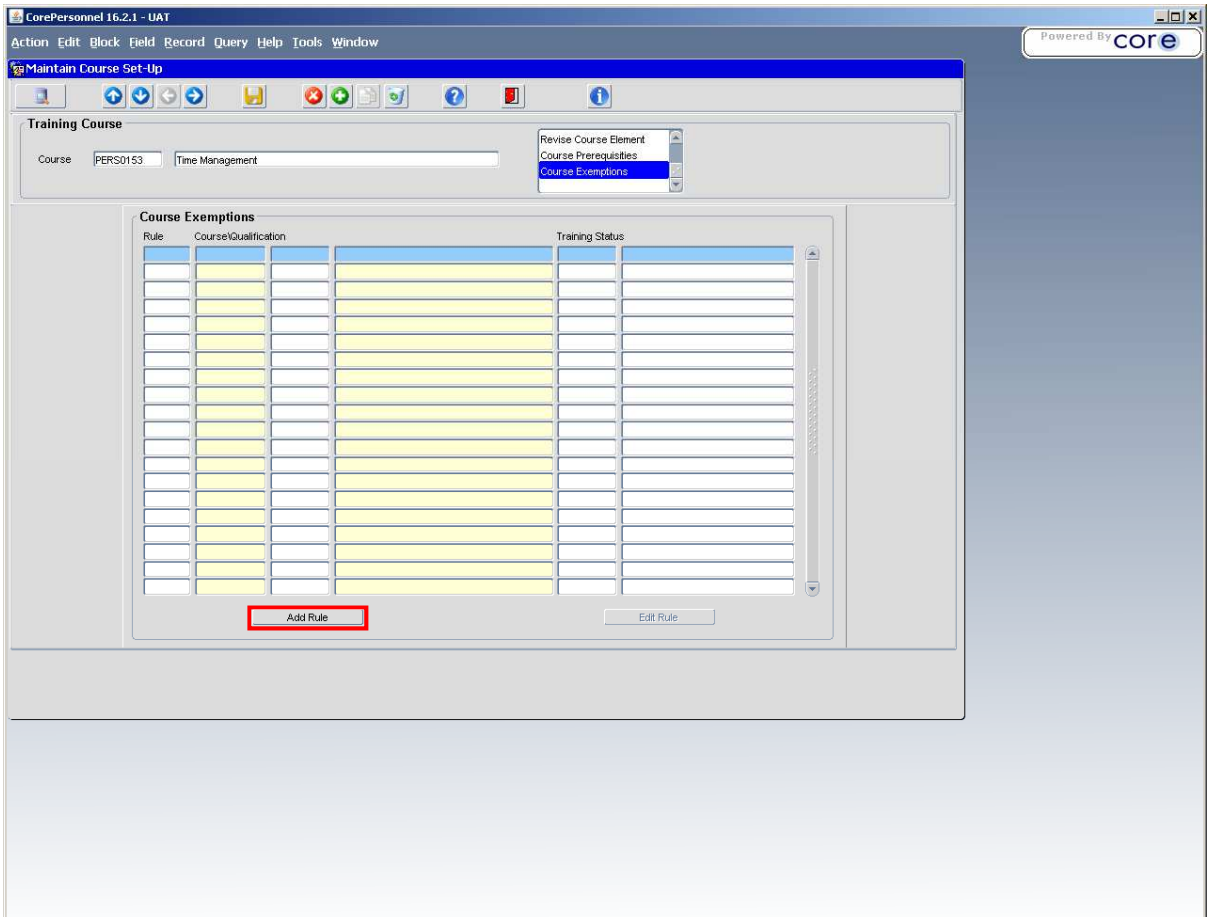
An exemption is where a candidate can be excused from completing a course that they would otherwise be required to complete depending on the status of the course on their training history or the qualifications they have attained (e.g. a candidate may be exempted from completing a course aimed at beginners if they have already completed the advanced equivalent). A warning message is displayed to alert the user of exemptions when generating a training request or scheduling a candidate on a course.

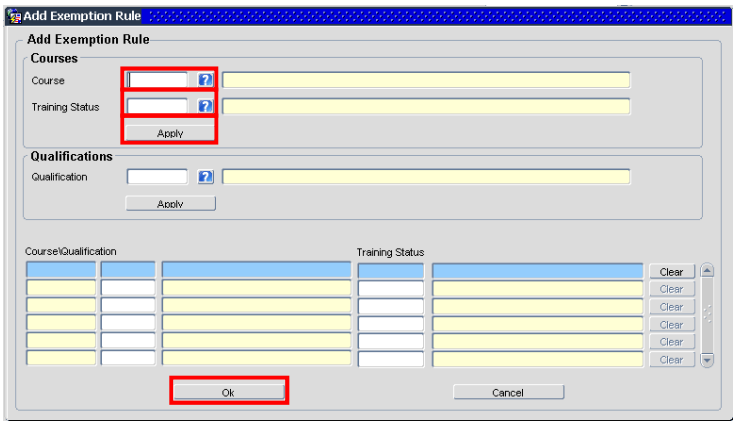
Set up a Course Exemption

1) Select **Course Exemptions** from the Select Detail menu on the Maintain Course Set-Up screen. The **Course Exemption** screen displays.



2) Click **Add Rule**. The **Add Exemption Rule** screen displays.





3) Select the Course you wish to create an exemption rule for by clicking the valid values button to display a list of courses. Alternatively, you may also select a qualification and exempt candidates from completing a course based on qualifications they have previously attained. If creating an exemption rule based on a qualification please proceed to instruction 5 below.

4) Select the Training Status (e.g. Completed) you wish to use as the basis for your exemption rule by clicking the valid values button to display a list of options.

5) Click **Apply**. The exemption rule is displayed in the table.

6) Repeat instructions 3 to 5 above to apply additional exemption rules.

7) Click **OK**. The Add Exemption Rule screen closes and the new exemption displays in the **Course Exemptions** screen.

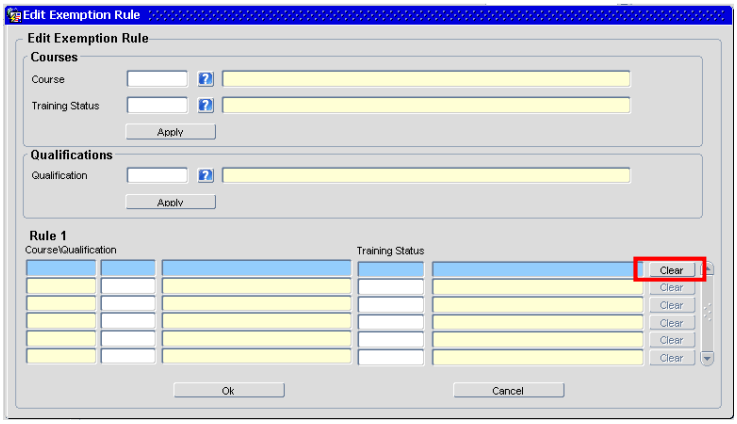
8) Click the **Exit** button on the toolbar to return to the main menu.

Edit an Exemption

1) Click on the rule in the **Course Exemption** screen you wish to edit such that it is highlighted blue.

2) Click **Edit Rule**. The **Edit Exemption Rule** screen displays.

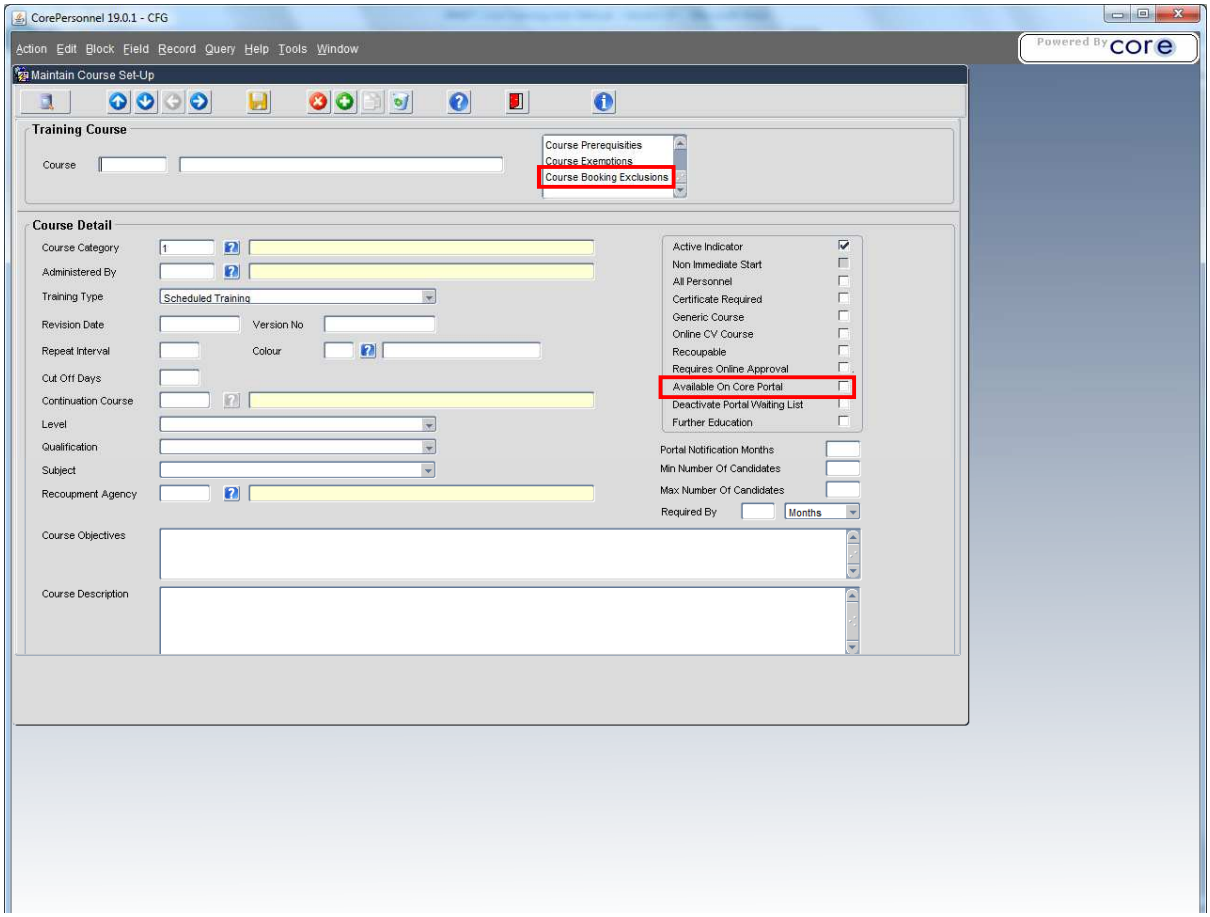
3) Click **Clear** to delete the exemption you wish to edit. Repeat instructions 3 to 8 above to define the revised exemption rule.



Course Booking Exclusions

Course Booking Exclusions enables you to exclude groups of staff from booking courses based on criteria defined in a rules matrix. Rules can be defined based on one or more of the following criteria: any hierarchy fields; Job Title; Employee Status; Paygroup; Appointment Status; Leaving Reason; Post Type; Category; and Grade. All staff will be able to view all courses, but staff meeting the matrix rules will be excluded from being able to book the course. For this functionality to be effective the Available on Core Portal indicator must be selected. Please note, this functionality works on an exclusion basis and not an inclusion basis.

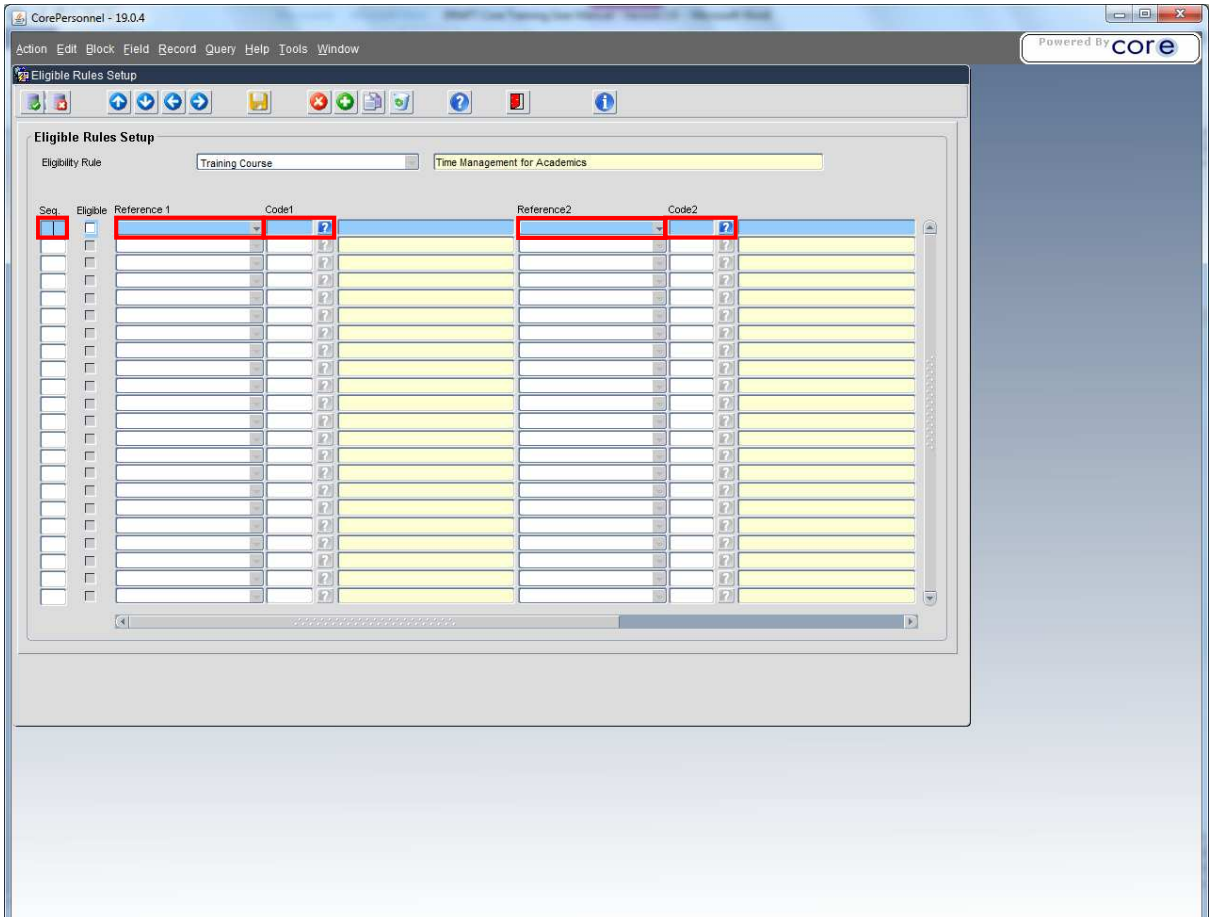
1) Select **Course Booking Exclusions** from the Select Detail menu on the Maintain Course Set-Up screen. The **Eligible Rules Setup** screen displays.



2) Enter a sequence number (e.g. 1, 2, 3, etc).

3) By selecting from the **Reference 1** and **Code1** drop down list, define the criterion to identify the group of staff you wish to exclude. Repeat this step in respect of the **Reference2** and **Code2** and **Reference3** and **Code3** fields to define up to 3 criteria on which to basis the exclusion rule.

4) Select the **Active** checkbox to enable the rule.



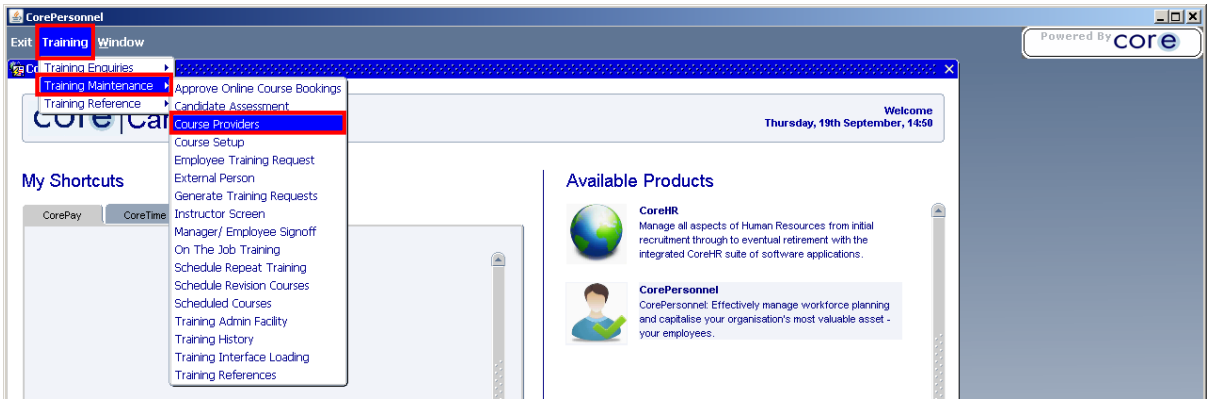
5) Repeat steps 2 to 4 above to define additional rules against the same course, if applicable.

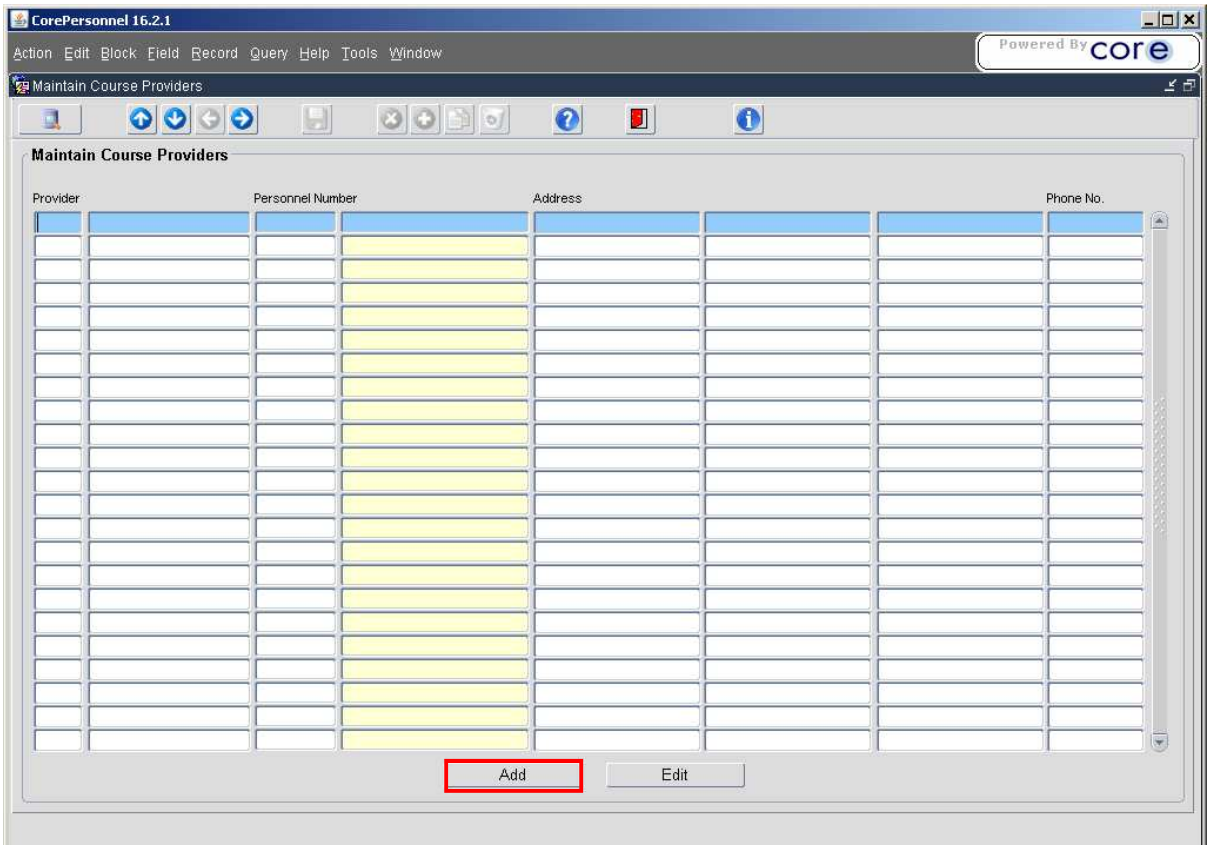
Course Providers

Every course needs to be linked to a Course Provider. The provider can be an external training company or an internal trainer.

Set up a Course Provider

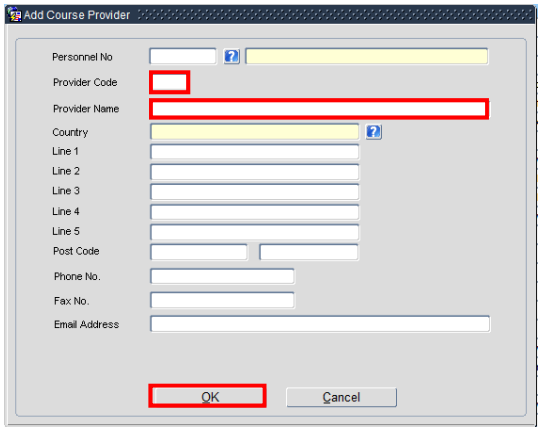
1) Select **Training** → **Training Maintenance** → **Course Providers**. The **Maintain Course Providers** screen displays. Existing providers are listed in alphabetical order by Provider Code.





2) Search the existing list of providers to check whether the provider has already been set up.

3) Click **Add**. The **Add Course Provider** screen displays.



4) Complete all relevant fields within the Add Course Provider screen as required. For an external course provider the Provider Code and Provider Name are mandatory fields. For an internal course provider click the valid values button to display a list of staff. It is recommended that the Providers initials are used as a Provider Code.

5) Click **OK**. The provider's details display in the Maintain Course Providers screen.

6) Click the **Exit** button on the toolbar to return to the main menu.

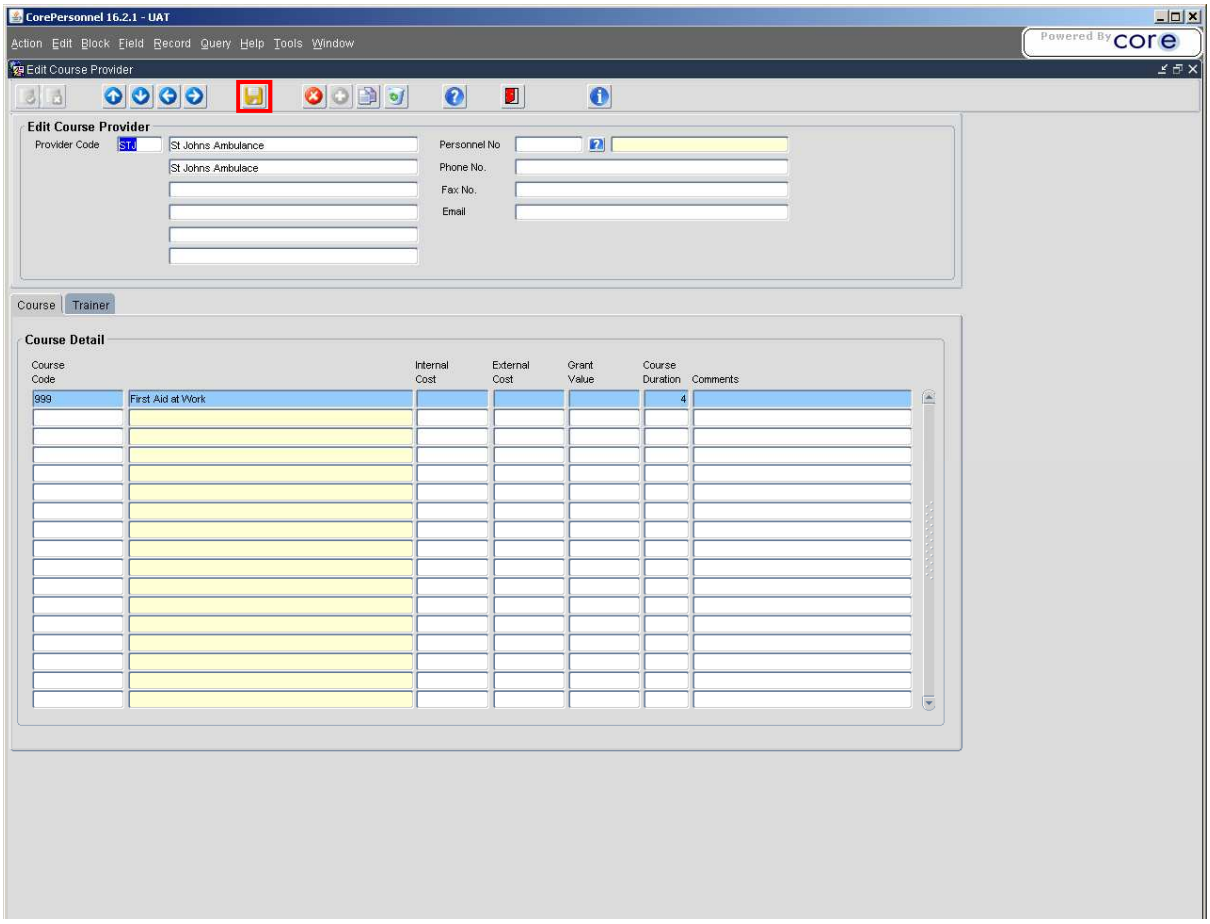
Edit a Course Provider

Course Provider records can be edited for external providers only. Course Provider records for internal providers cannot be edited as these records are auto-populated based on the staff members work contact details.

1) Click on the **Provider** record in the **Maintain Course Providers** screen you wish to edit such that it is highlighted blue.

2) Click **Edit**. The **Edit Course Provider** screen displays.

3) Click the **Exit** button on the toolbar to return to the main menu.



4) Amend the provider details as necessary.

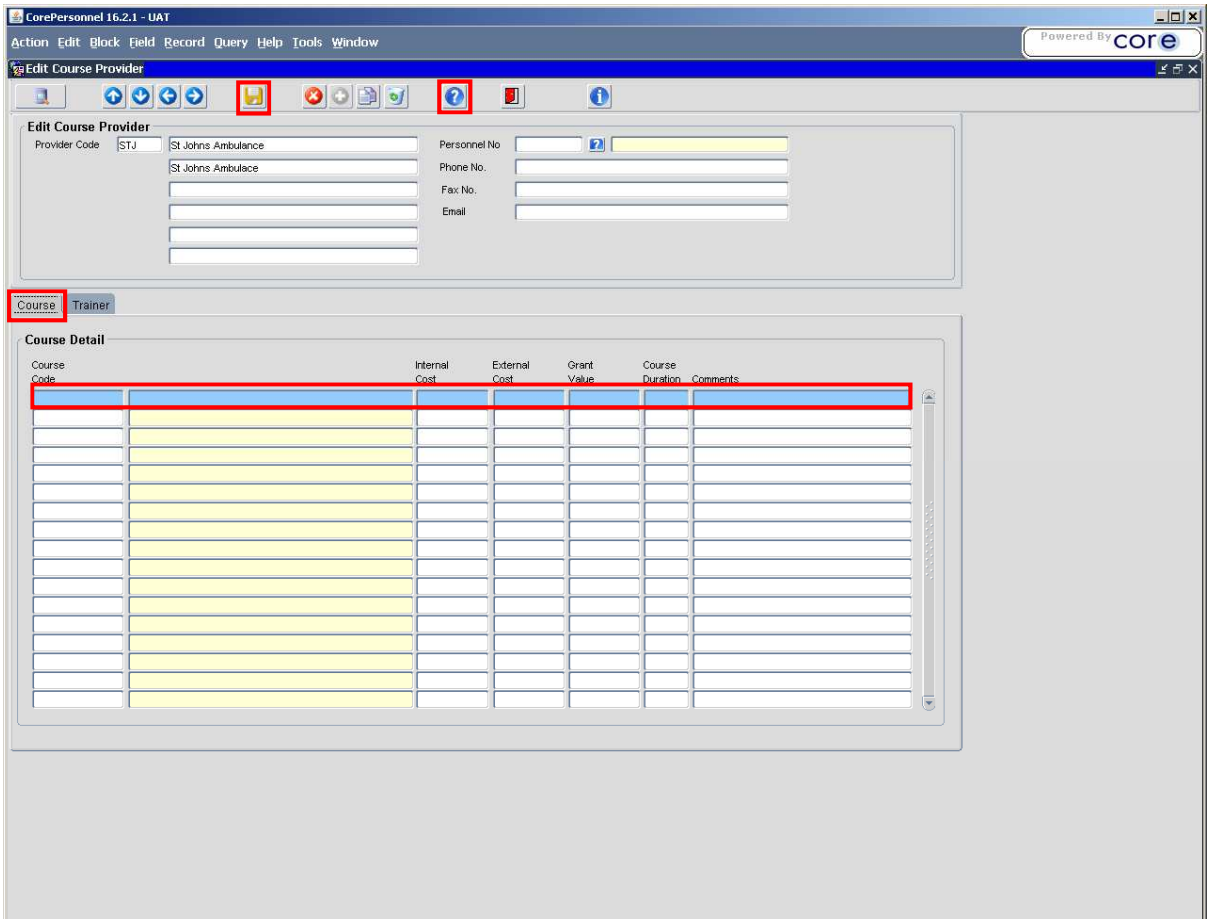
5) Click **Save** .

Link a Course Provider to a Course

After setting up a Course Provider the provider must be linked to a specific course.

1) Double click on a Course Provider within the Maintain Course Providers screen. The **Edit Course Provider** screen displays.

2) Click the **Course** tab such that the **Course Detail** table displays.



3) Click the 1st blank row in the Course Detail table such that the row is highlighted blue.

4) Click the valid values button in the main toolbar. A list of courses is displayed.

5) Select the course from the list that you wish to link to the provider.

6) Click **OK**. The list of courses closes and the selected course is displayed in the **Course Detail** table.

7) Enter additional details into the **Course Detail** table if known (e.g. Course Duration).

8) Click **Save**.

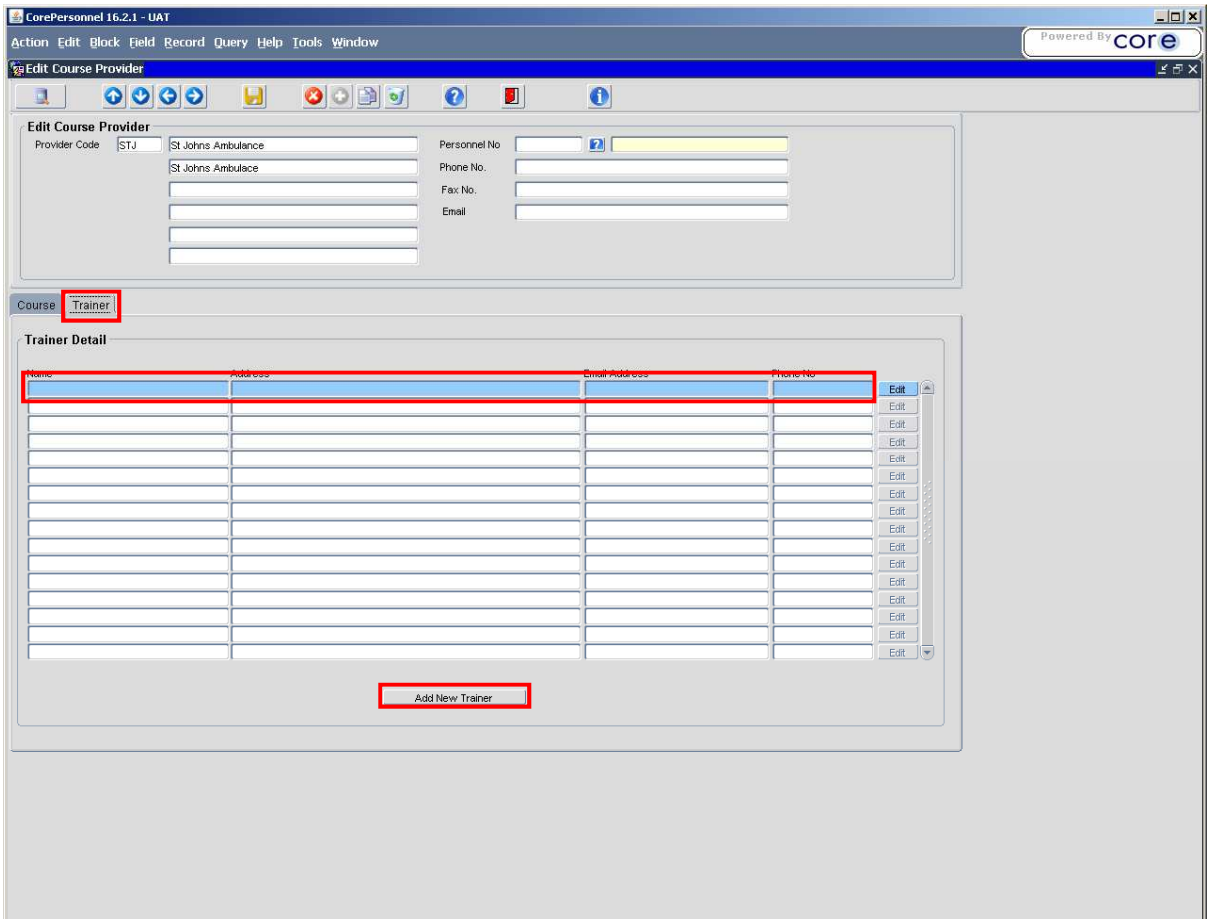
9) Click the **Exit** button on the toolbar to return to the main menu.

Add a Trainer

If the provider is a training company it may be appropriate to record details of the specific trainer or person facilitating the course.

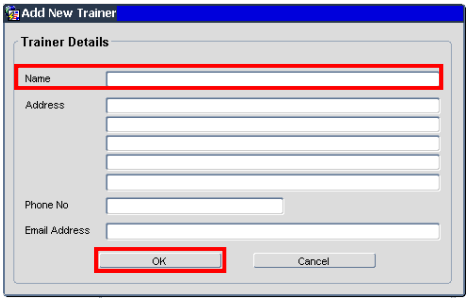
1) Double click on a Course Provider within the Maintain Course Providers screen. The **Edit Course Provider** screen displays.

2) Click the **Trainer** tab such that the **Trainer Detail** table displays.



3) Click the 1st blank row in the Trainer Detail table such that the row is highlighted blue.

4) Click the **Add New Trainer** button. The **Add New Trainer** screen displays. The Trainer Name is a mandatory field.



5) Complete all relevant fields within the Add New Trainer screen as required.

6) Click **OK**. The Add New Trainer screen closes and the new trainer record is displayed in the **Trainer Detail** table.

7) Click **Save** .

8) Click the **Exit** button on the toolbar to return to the main menu.

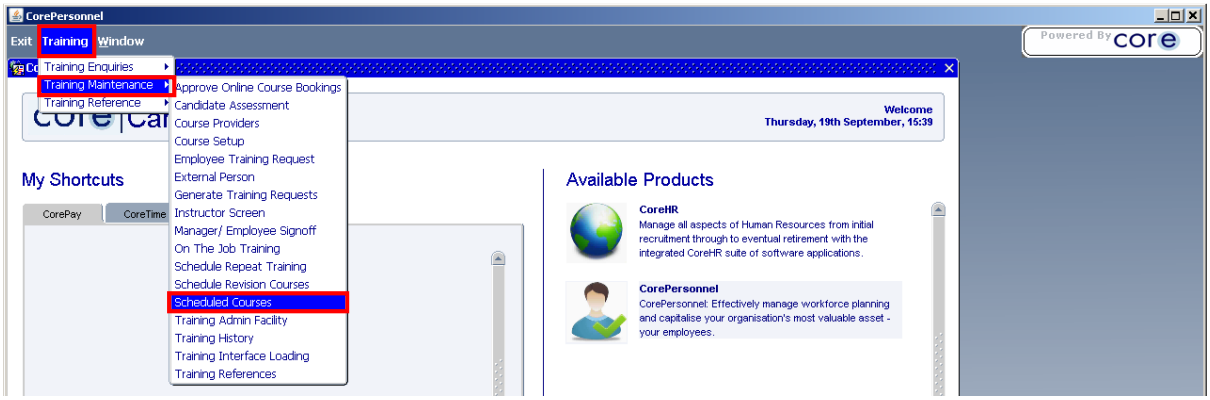
Run Scheduled Courses

Run Scheduled Courses

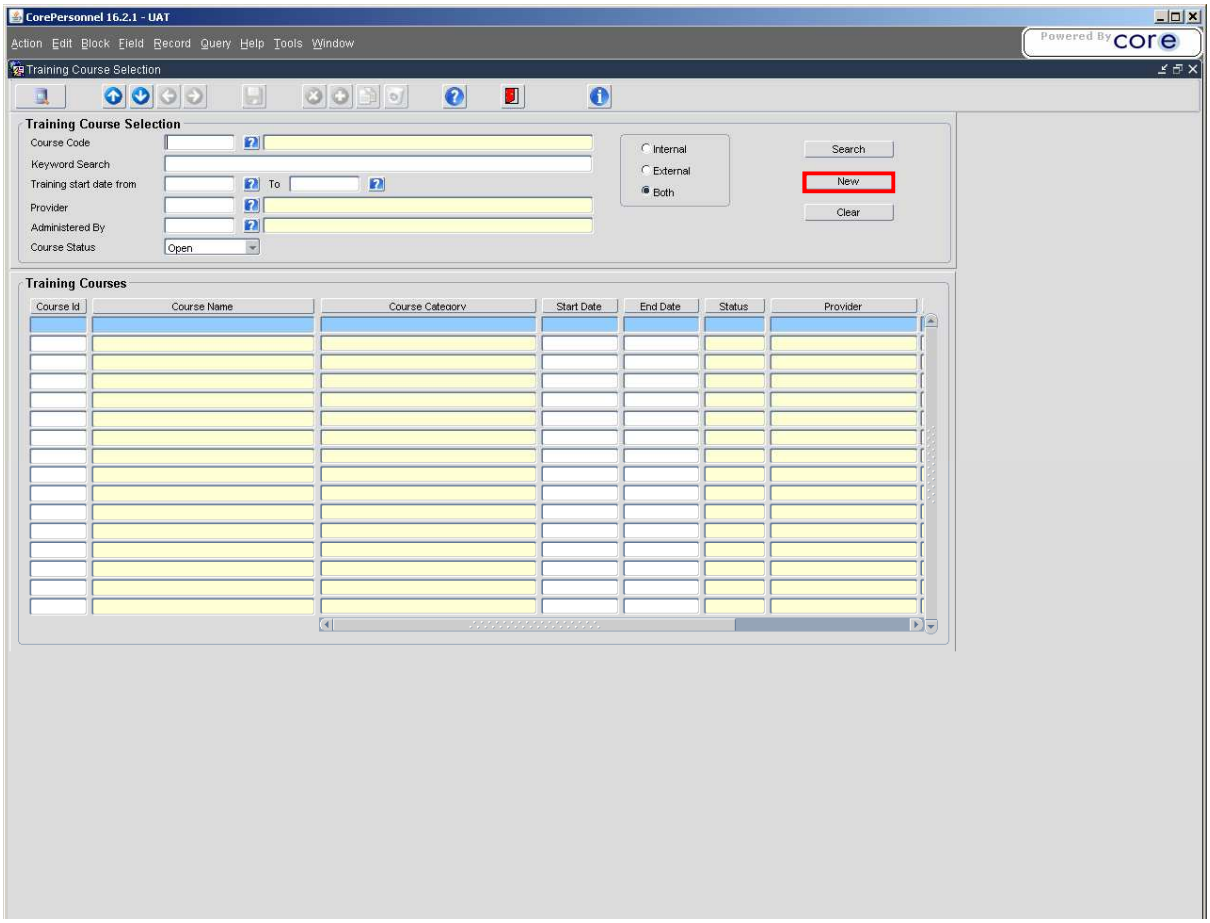
After a course has been created you will need to create specific events associated with that course.

Create Event

1) Select **Training → Training Maintenance → Scheduled Courses**. The **Training Course Selection** screen listing all events displays.

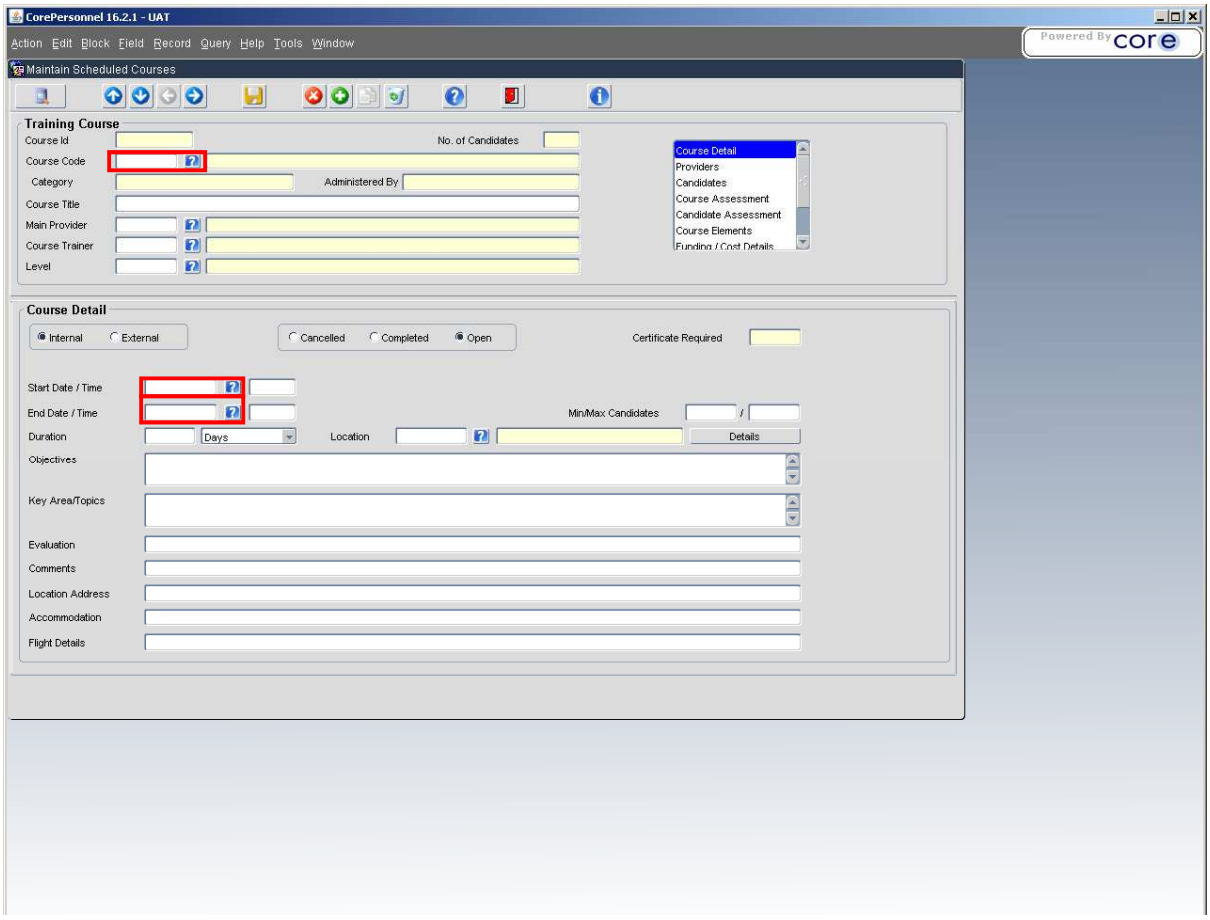


2) Search for existing events for the course to ensure the event you want to create has not been created previously (n.b. you can do this by setting the Course Status to All).



3) Click **New**. The **Maintain Scheduled Courses** screen displays.

4) Complete all relevant fields within the Maintain Scheduled Courses screen as required. Course Code, Start Date and End Date are mandatory fields.



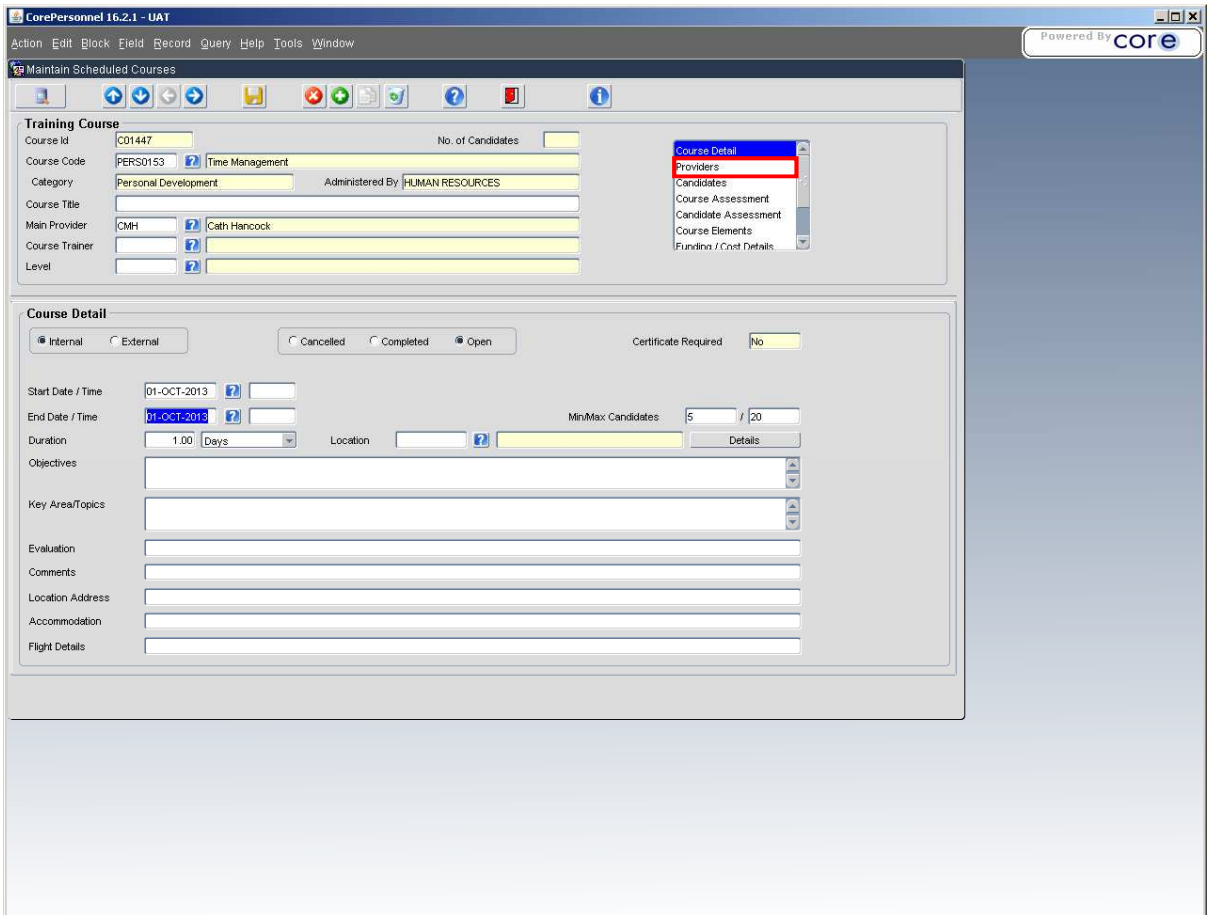
i.	Course Title	Field to be left blank unless used as part of a generic course. If being used as part of a generic course, this field can be used to indicate the specific title of the event attended.
ii.	Main Provider	Field auto-populates if the course has been linked to a provider. Alternatively a provider can be selected from the list of valid values.
iii.	Course Trainer	A facilitator can be selected from the list of valid values.
iv.	Level	Indicates the level of qualification, if applicable, associated with completing the course.

v.	Internal/ External	An indicator can be selected for internal or external courses.
vi.	Cancelled/ Completed/ Open	Indicates the status of the event. Indicator defaults to Open.
vii.	Start Date/ Time	Start date and time.
viii.	End Date/ Time	End date and time
ix.	Duration	Duration of event. This field auto-populates from the Maintain Course Providers screen if completed.
x.	Min/Max Candidates	These fields auto-populate from the Maintain Course Set-Up screen if completed but can be varied for each event if necessary.
xi.	Location	The location of the course can be entered into this free text field.
xii.	Objectives	This field auto-populates from the Maintain Course Set-Up screen if completed but can be varied for each event if necessary.
xiii.	Key Area/Topics	A free text field is available to hold additional details.
xiv.	Evaluation	A free text field is available to hold additional details.
xv.	Comments	A free text field is available to hold additional details.
xvi.	Location Address	A free text field is available to hold additional details.
xvii.	Accommodation	Record trainer accommodation details here if applicable.
xviii.	Flight Details	Record trainer flight details here if applicable.

Providers

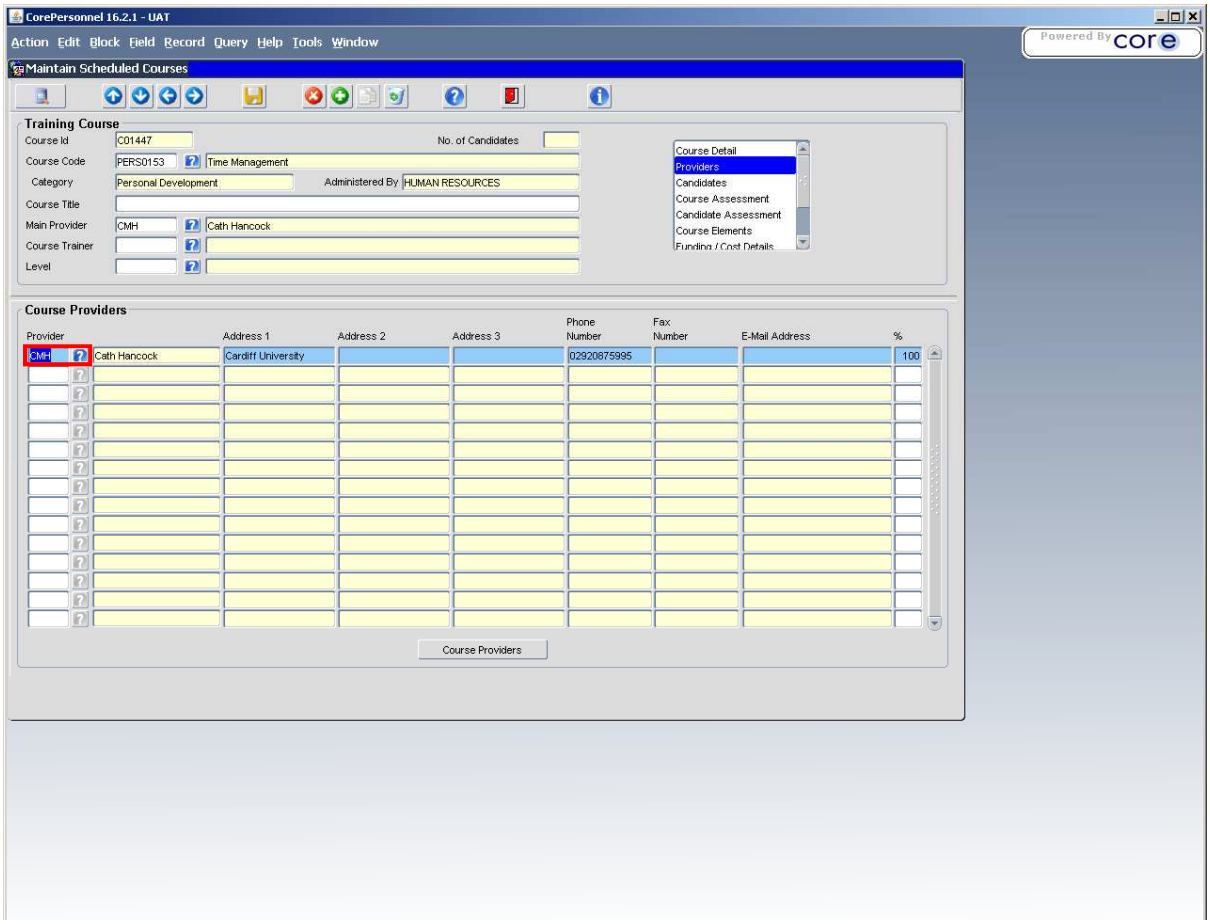
The Main Provider field in the Maintain Scheduled Courses screen auto-populates if the course has been linked to a provider (see page 27). Here an alternative provider can be selected for a specific event or multiple providers can be selected with each provider allocated a percentage of the event as a whole.

1) Select **Providers** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Course Providers** table displays.



To change an existing provider:

2) Click the valid values button adjacent to the provider you wish to change. A list of providers is displayed.



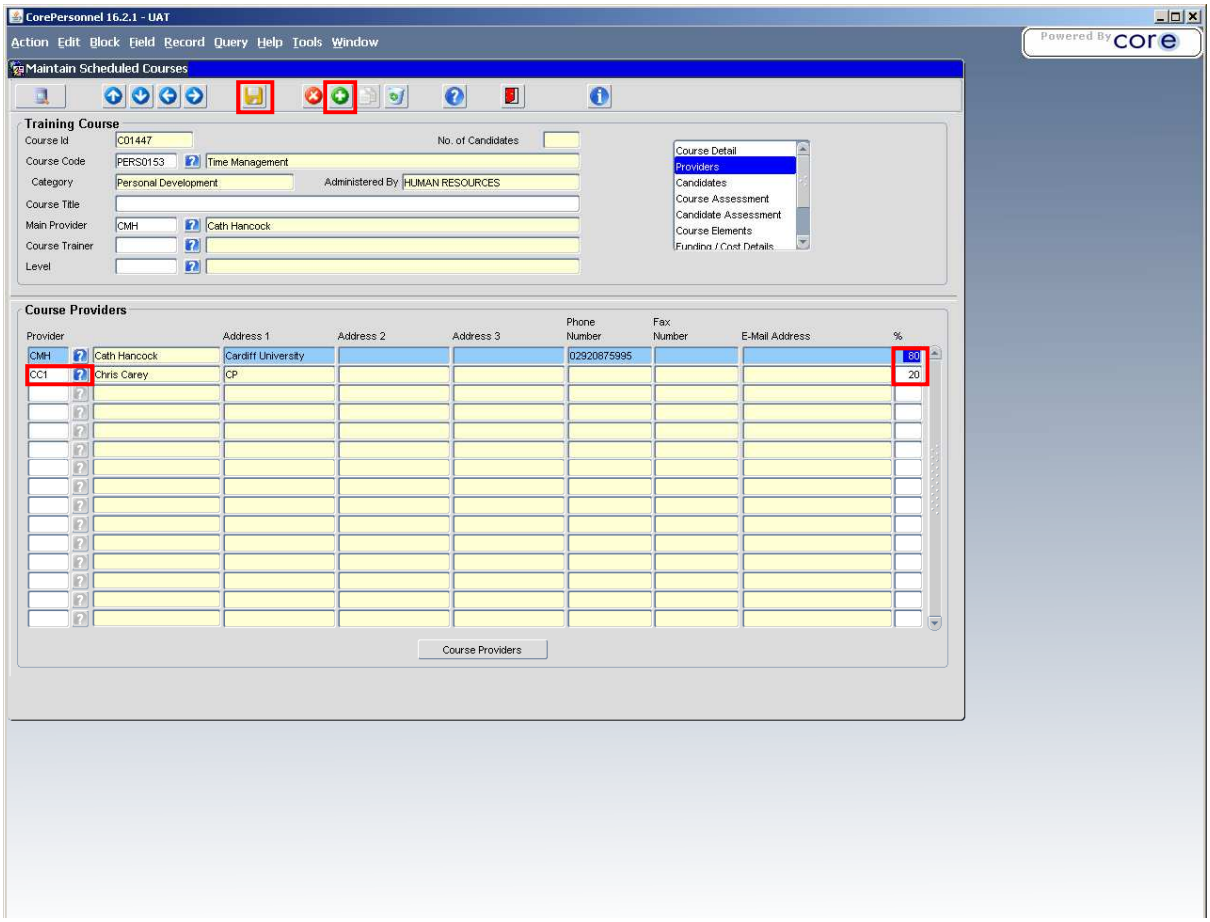
3) Select the new provider from the list and click **OK**. The list of providers closes and the new provider is displayed in the Course Providers table.

4) Click **Save** .

5) Click the **Exit** button on the toolbar to return to the main menu.

To add multiple providers:

1) Click the **Insert new record** button in the main toolbar or click on the 1st blank row in the Course Providers table.



2) Click the valid values button which sits within this row. A list of providers is displayed.

3) Select the new provider from the list and click **OK**. The list of providers closes and the new provider is displayed in the Course Providers table.

4) Amend the percentage figures for each of the providers listed in the Course Providers table so that the total percentage contribution by all providers equals 100%.

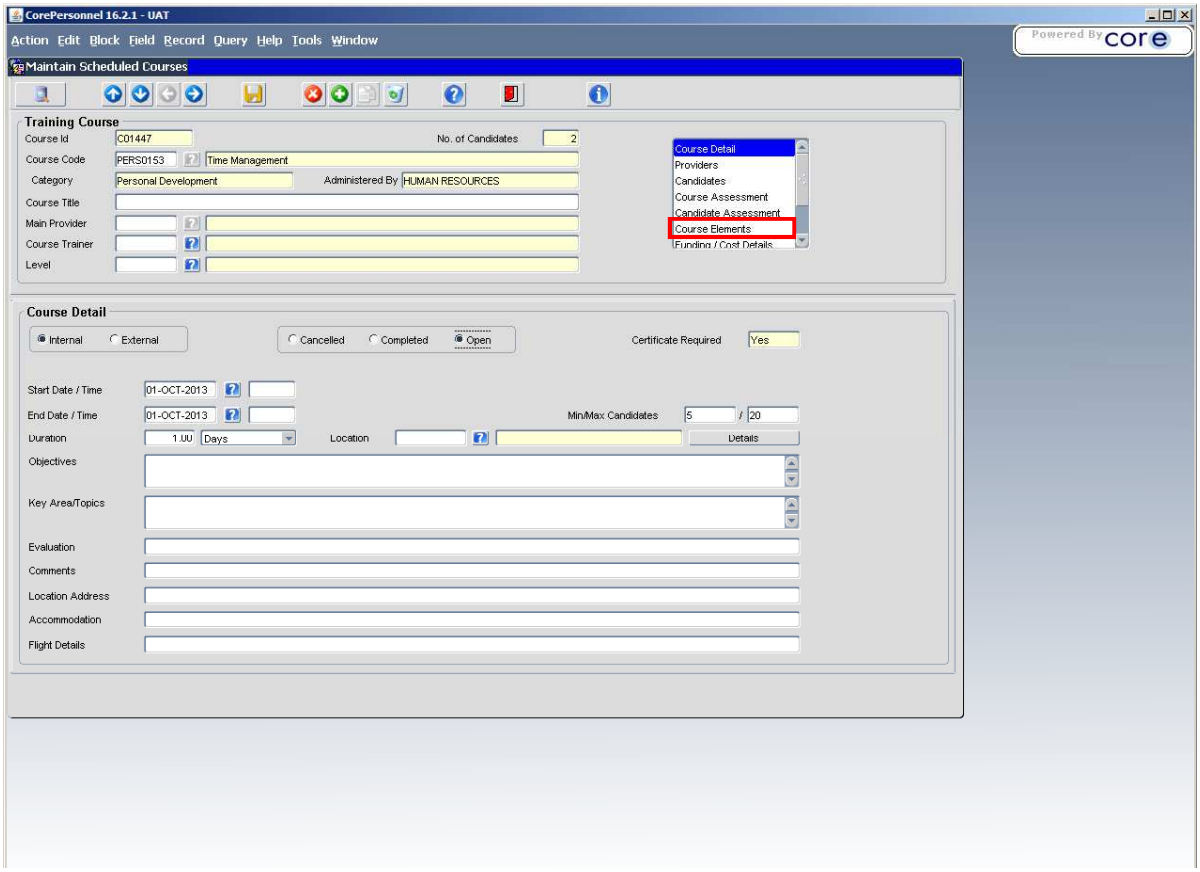
5) Click **Save** .

6) Click the **Exit** button on the toolbar to return to the main menu.

Course Elements

For modular programmes you are able to set-up course elements when creating the course (see page 14). As long as the elements have been setup at the course level the elements will automatically be linked to the event. At the event level you will need to enter specific dates for each of the modules which form part of the programme.

1) Select **Course Elements** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Course Elements** table displays.



2) Enter the date for each of the course elements in the **Training Date** column.

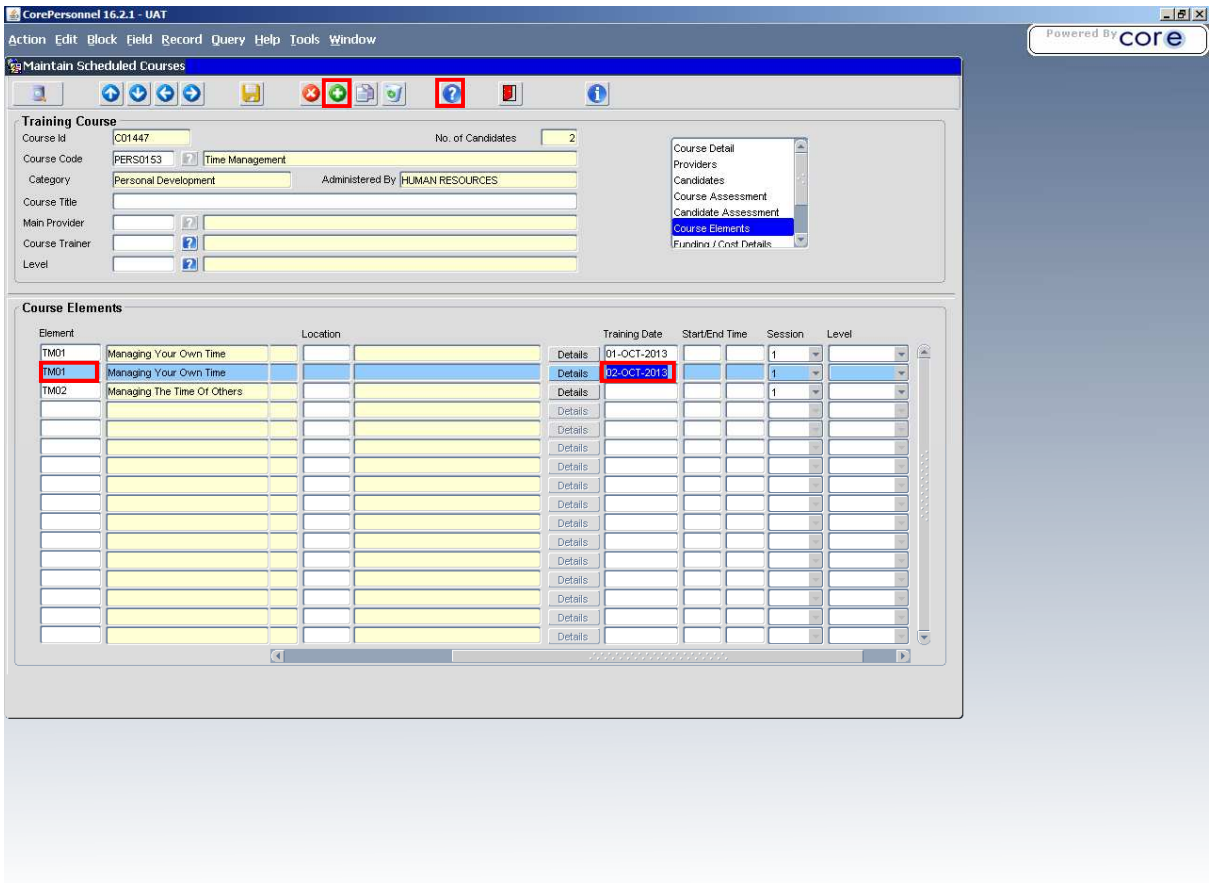
3) Where a course element spans more than one day you will need to create multiple entries for the course element in the Course Elements table so that you can enter a date against each element. To insert a new course element click the **Insert new record** button.

4) Select the element you wish to add by clicking on the valid values button.

5) Enter the **Training Date** that the second day of this element is to take place on.

The print screen below shows an example where element TM01 takes places over two days. The element is listed twice in the table to enable the two dates to be recorded. Each day of an element can also be broken down into up to four sessions. This enables you to record attendance against

each session on the Register. To do this, add the element into the table using the same Training Date for each entry. Create as many entries as sessions you want to record. Select the session number from the drop down selection list.

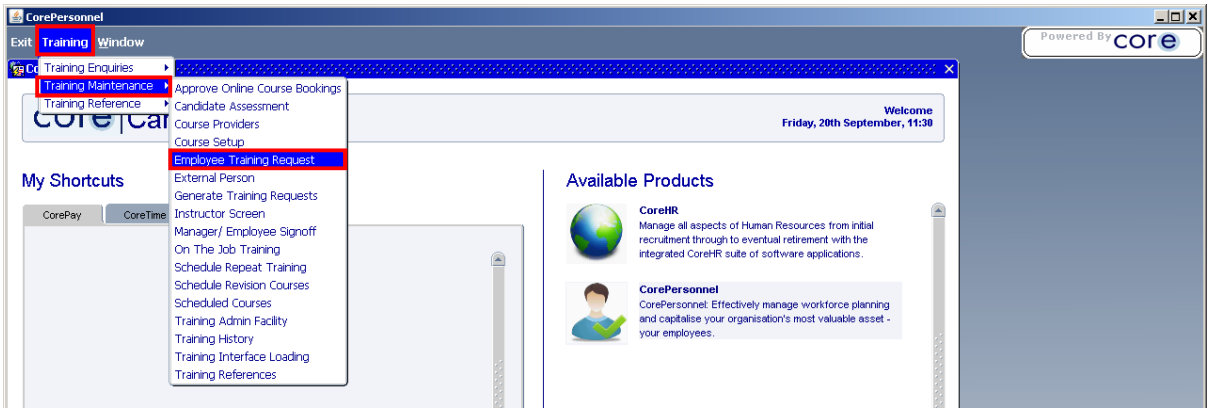


Candidates

Candidates can be selected from the waiting list or they can be scheduled a place directly on a specific event.

Create Training Request/ Add a Candidate to a Waiting List

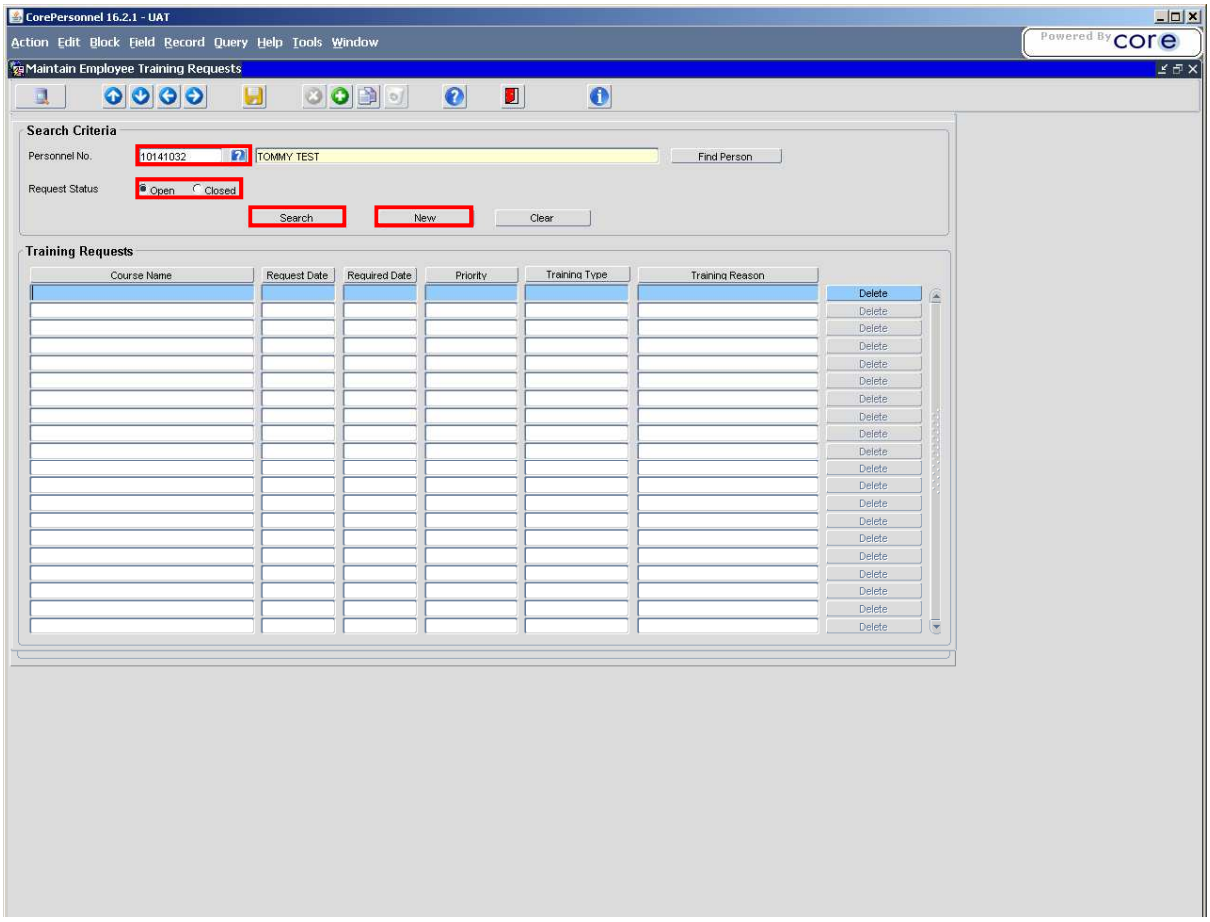
1) Select **Training** → **Training Maintenance** → **Employee Training Request**. The **Maintain Employee Training Request** screen displays.



2) Click the valid values button adjacent to the Personnel No. field. A list of employees is displayed.

3) Select the employee for whom you wish to create a training request from the list click **OK**. The default status is set to Open.

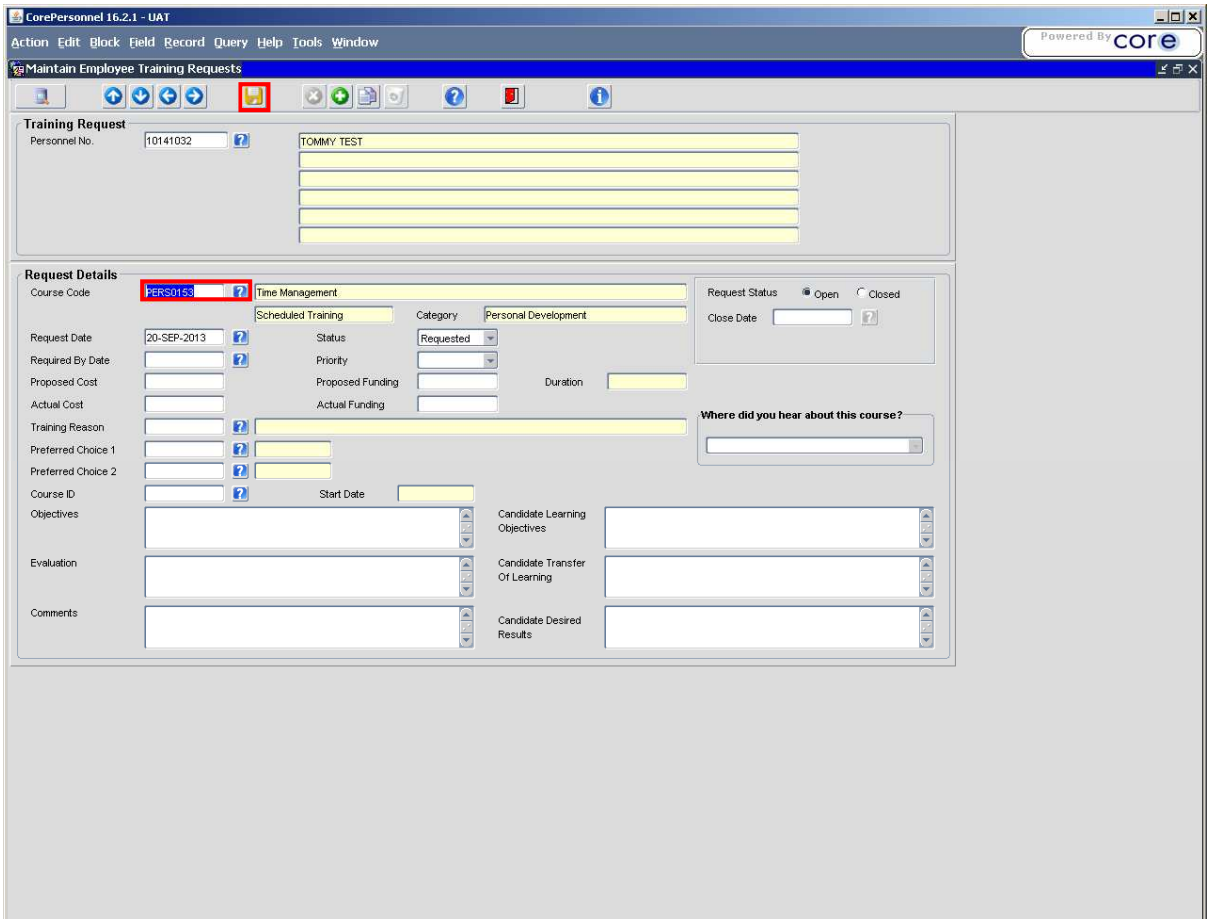
4) Click **Search**. Any outstanding training requests will display, depending on the status selected during the search in point 3 above (i.e. Open or Closed).



5) To edit any details on the outstanding training requests, double click on the record.

6) To delete any requests, click the **Delete** button adjacent to the training request.

7) Click **New** to create a new training request. The **Maintain Employee Training Requests** screen displays.



8) Complete all relevant fields within the Maintain Employee Training Requests screen as required. Course Code is a mandatory field.

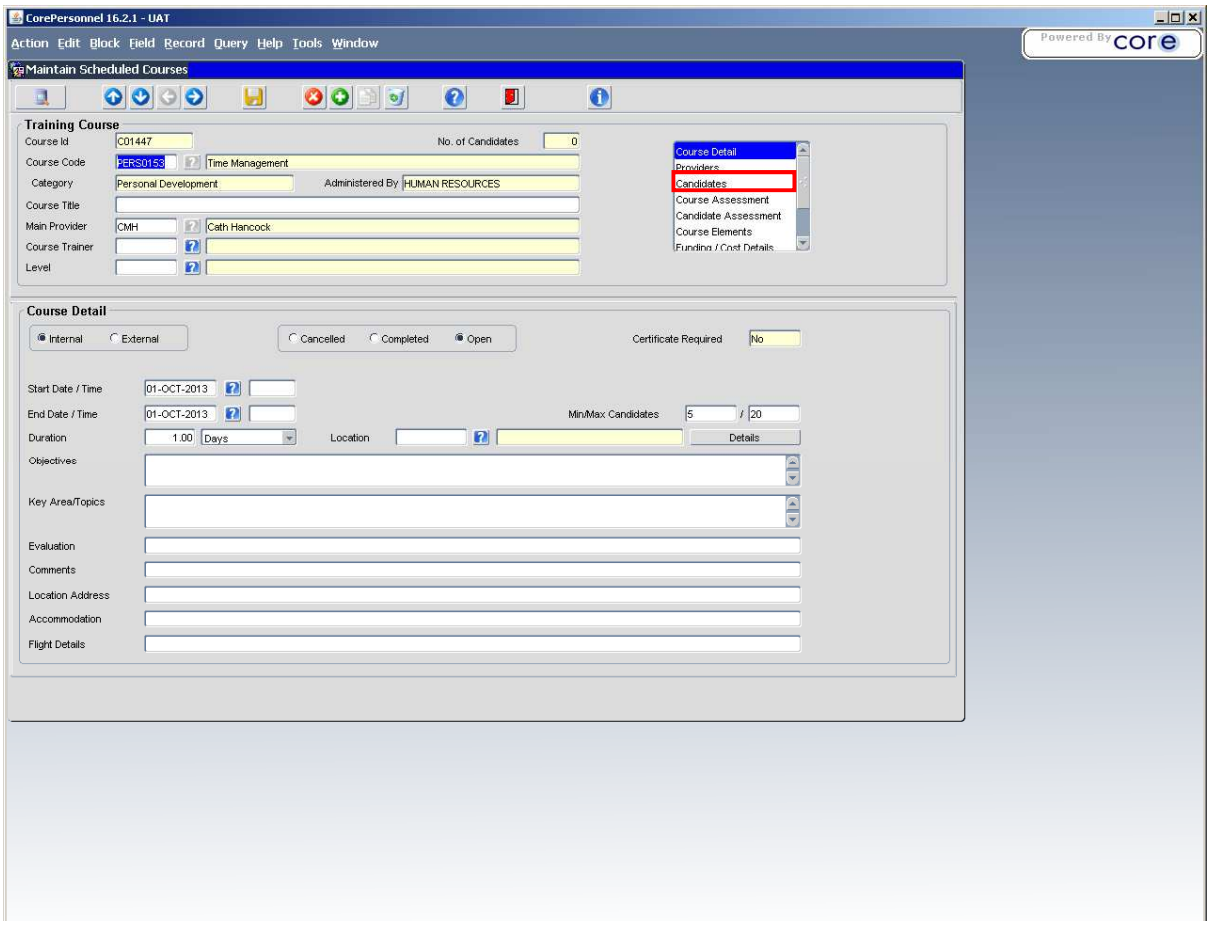
9) Click **Save** . The request is available in the **Maintain Employee Training Request** screen.

10) Click the **Exit** button on the toolbar to return to the main menu.

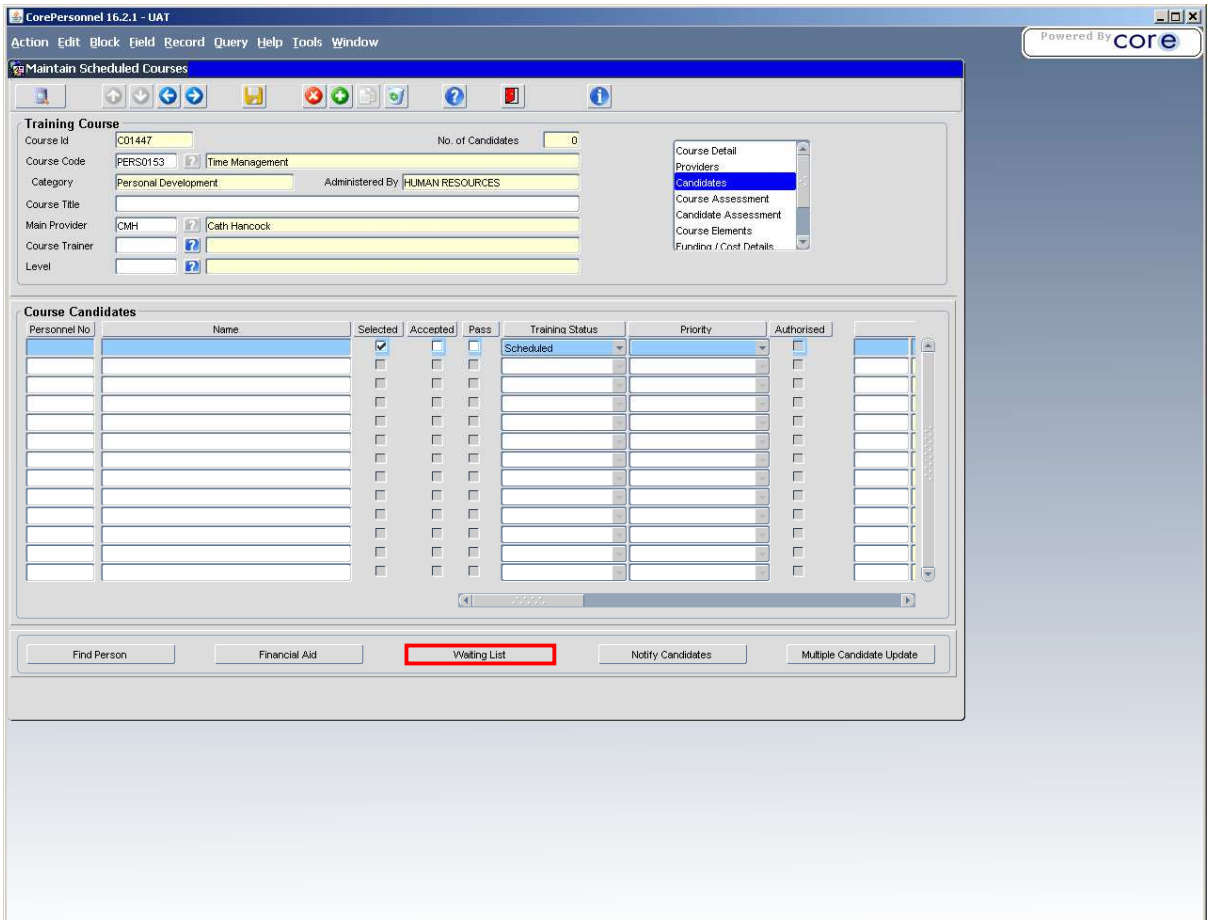
Add a Candidate to an Event from a Waiting List

The waiting list function can be used to transfer candidates from a holding area, onto a specific event. The candidates appear on the waiting list via employee training requests (see page 39).

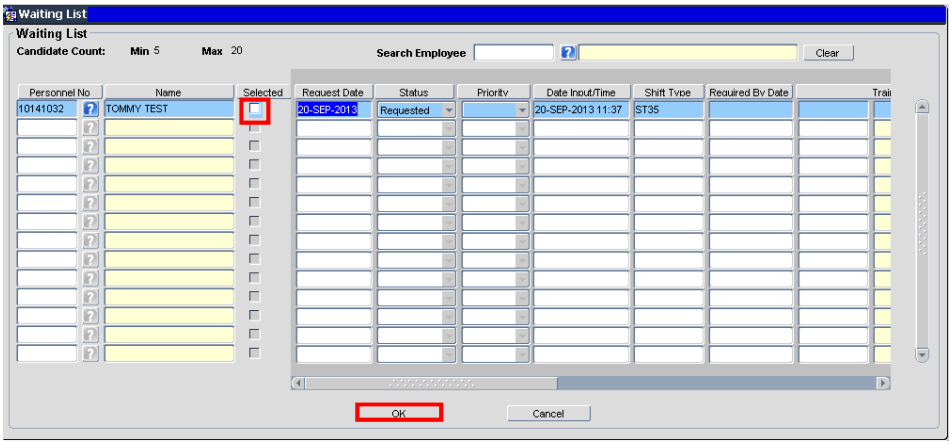
1) Select **Candidates** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Course Candidates** table displays.



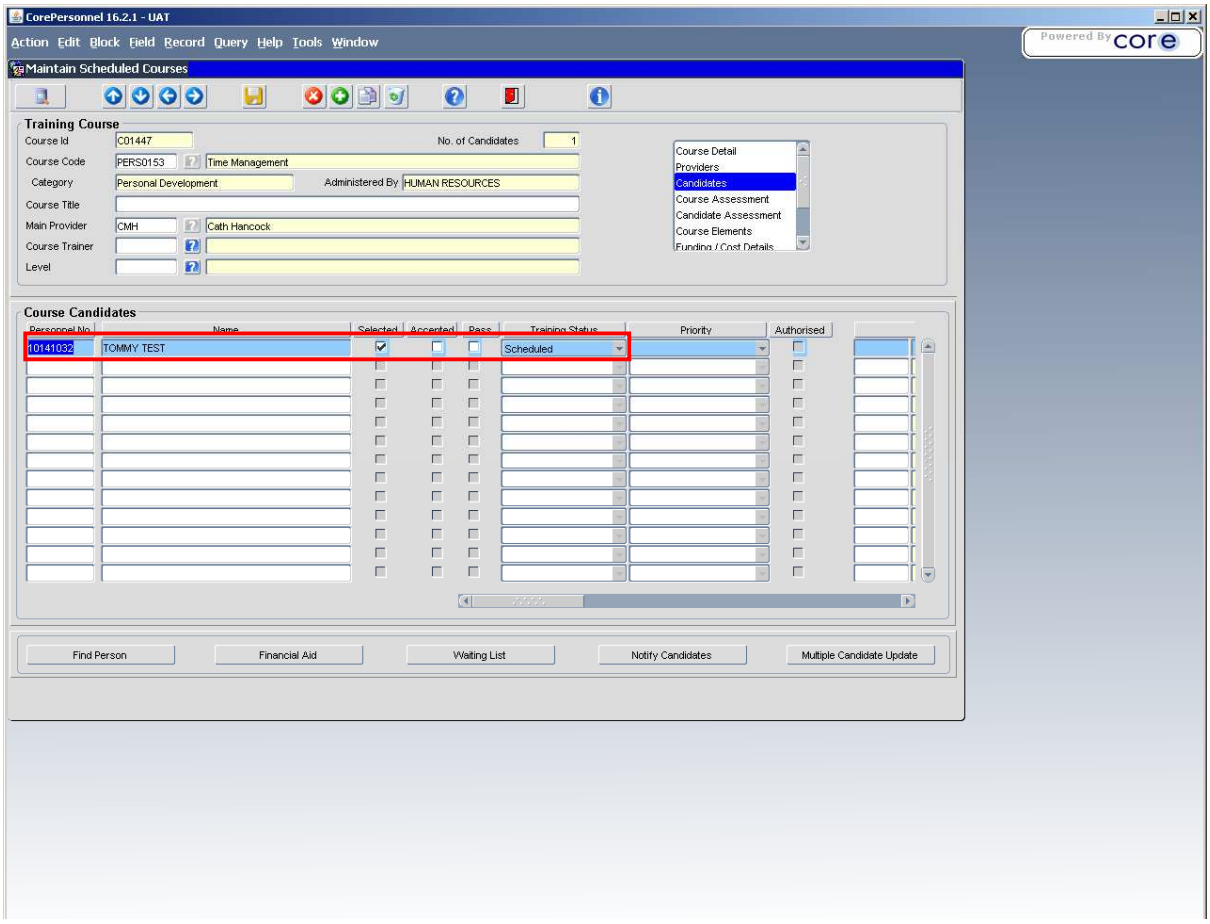
2) Click Waiting List. The **Waiting List** screen displays or a message displays stating that the **Waiting List is Empty**.



3) Click the **Selected** check box (i.e. ensure that the check box is ticked).



4) Click **OK**. The Waiting List screen closes and the selected candidate(s) are displayed in the Course Candidates table with a Training Status of Scheduled.



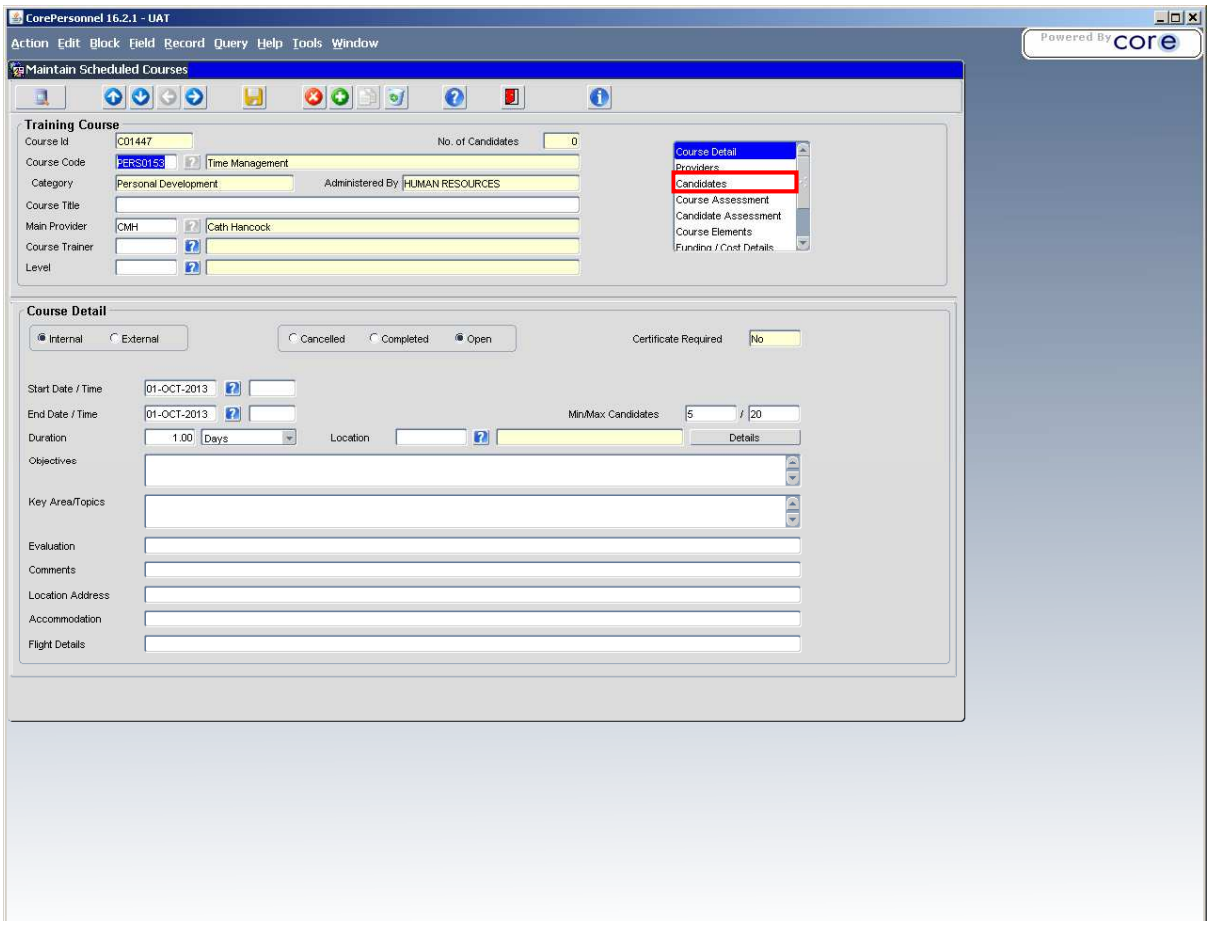
5) Depending on the setup of the course warning messages may display stating that: the minimum number of delegates has not been reached; the maximum number of delegates has been exceeded; the candidate has not met the prerequisites for the course; the person is exempt from the course. Click **Yes** to continue to add the candidate or click **No** to cancel.

6) Click the **Exit** button on the toolbar to return to the main menu.

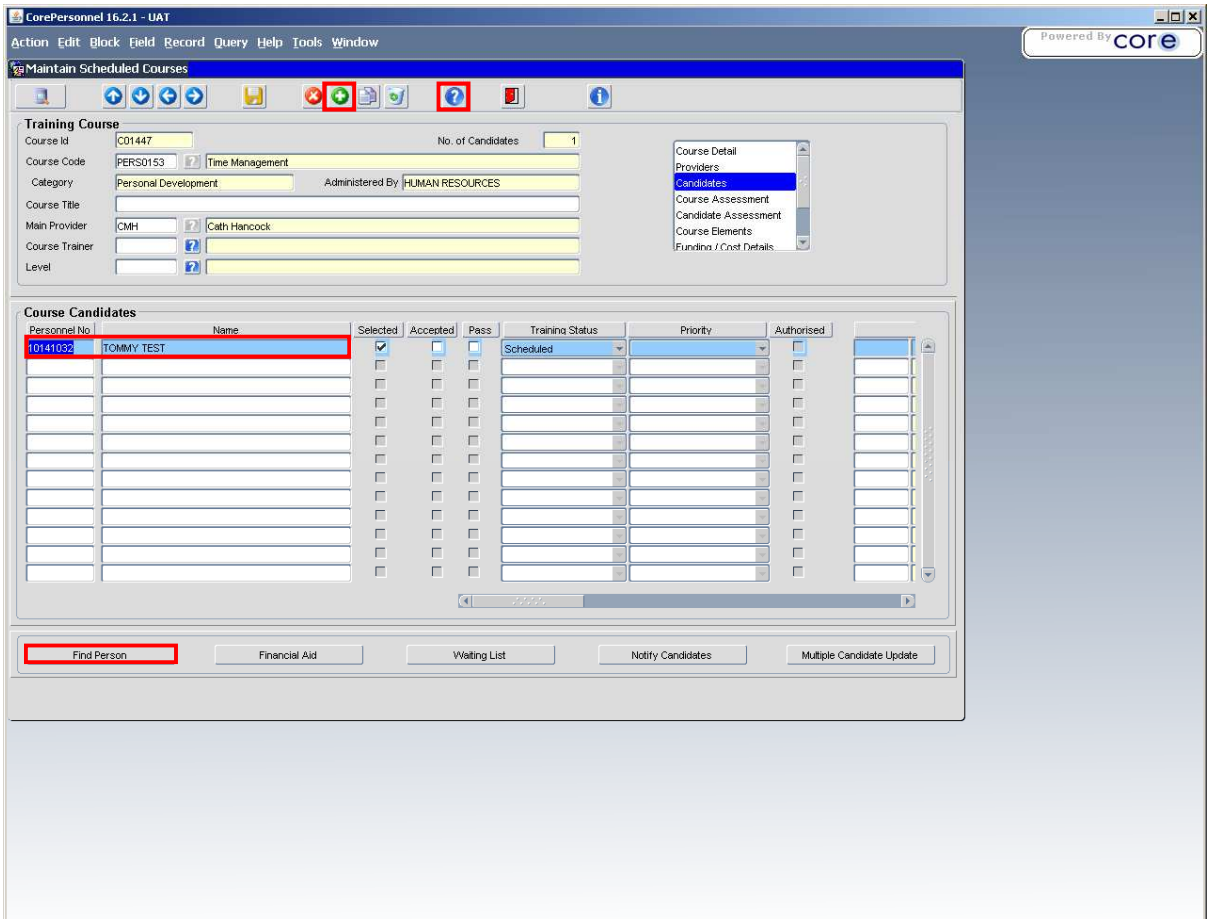
Add a Candidate Directly to an Event

It is recommended that before adding a candidate directly to an event you check whether any candidates are on the waiting list for that course.

1) Select **Candidates** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Course Candidates** table displays.



2) Click the **Insert new record** button in the main toolbar or click on the Personnel No field in the 1st blank row in the Course Candidates table.



3) Click the question mark button in the main toolbar. A list of potential candidates displays. Alternatively, click on the Find Person button to search for an employee by Personnel No, Name, Email Address, Department, or Status.

4) Select the desired candidate from the list and click **OK**. The candidate's details display in the **Course Candidates** table. The Candidates Training Status defaults to Scheduled.

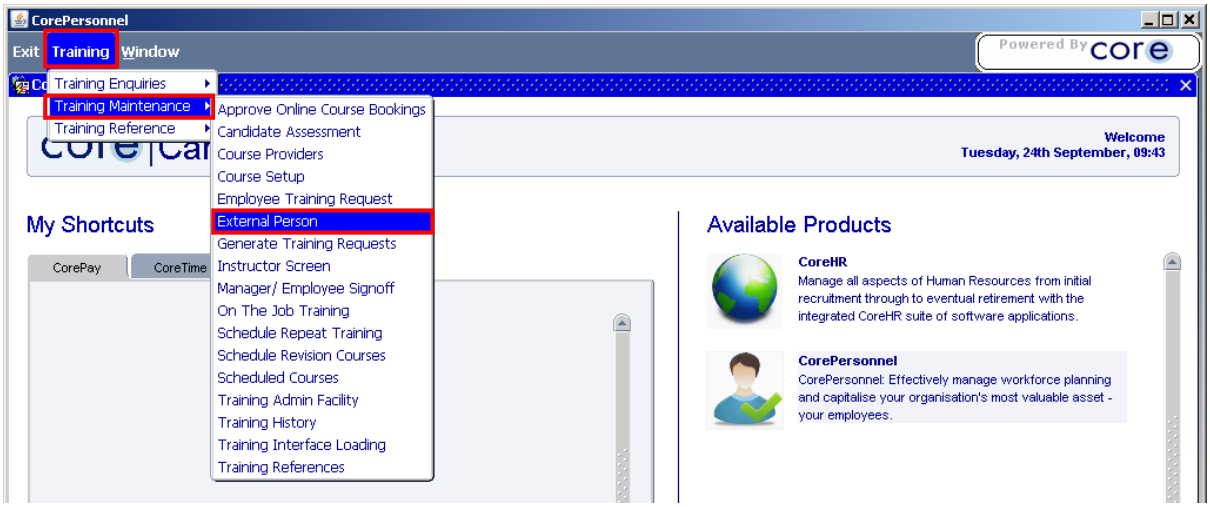
5) Click **Save** .

6) Click the **Exit** button on the toolbar to return to the main menu.

External Candidates

External candidates (i.e. any candidates who aren't members of staff) can be set up in the system to enable them to be added as candidates to a course. Core refers to an external candidate as an External Person.

1) Select **Training** → **Training Maintenance** → **External Person**. The **Maintain External Person** screen displays.

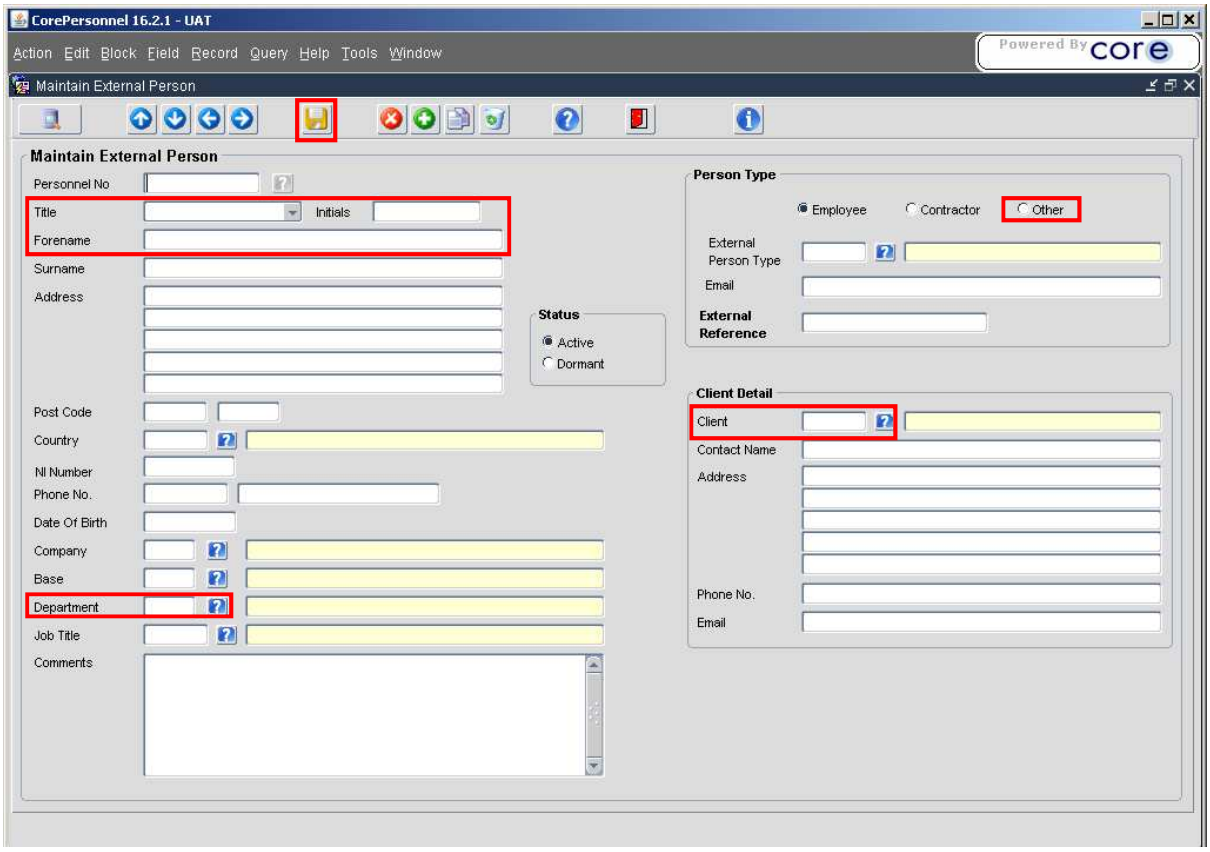


2) Select a Person Type from the indicators available. In most cases the **Other** Person Type should be selected.

3) Where the Other Person Type is selected the Department and Client code fields are mandatory. For Department, the department providing the training should be selected. Client code refers to the external candidates employing organisation. If the appropriate employing organisation is not available in the list please contact Human Resources on 02920 879777 or at people@cardiff.ac.uk to request the new Client code be added to the reference data.

4) Insert the relevant details for the external person. Client Details can also be recorded.

5) Click Save and a personnel number displays in the Personnel No. field. The number is prefixed by the letter E.



6) Click the **Exit** button on the toolbar to return to the main menu.

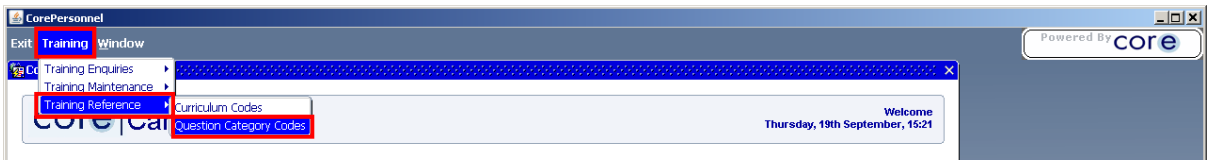
Evaluation Questionnaires

Setting up Evaluation Questionnaires

Evaluation questionnaires can be created in Core Training and released to candidates or their line managers via Portal. An evaluation questionnaire is created in Core by first creating a question category and subsequently by creating a question profile or pool of questions. Later this evaluation questionnaire can be linked to one or more courses.

Create a Question Category Code and Create a Question Profile

1) Select **Training** → **Training Reference** → **Question Category Codes**. The **Question Category Maintenance** screen displays.

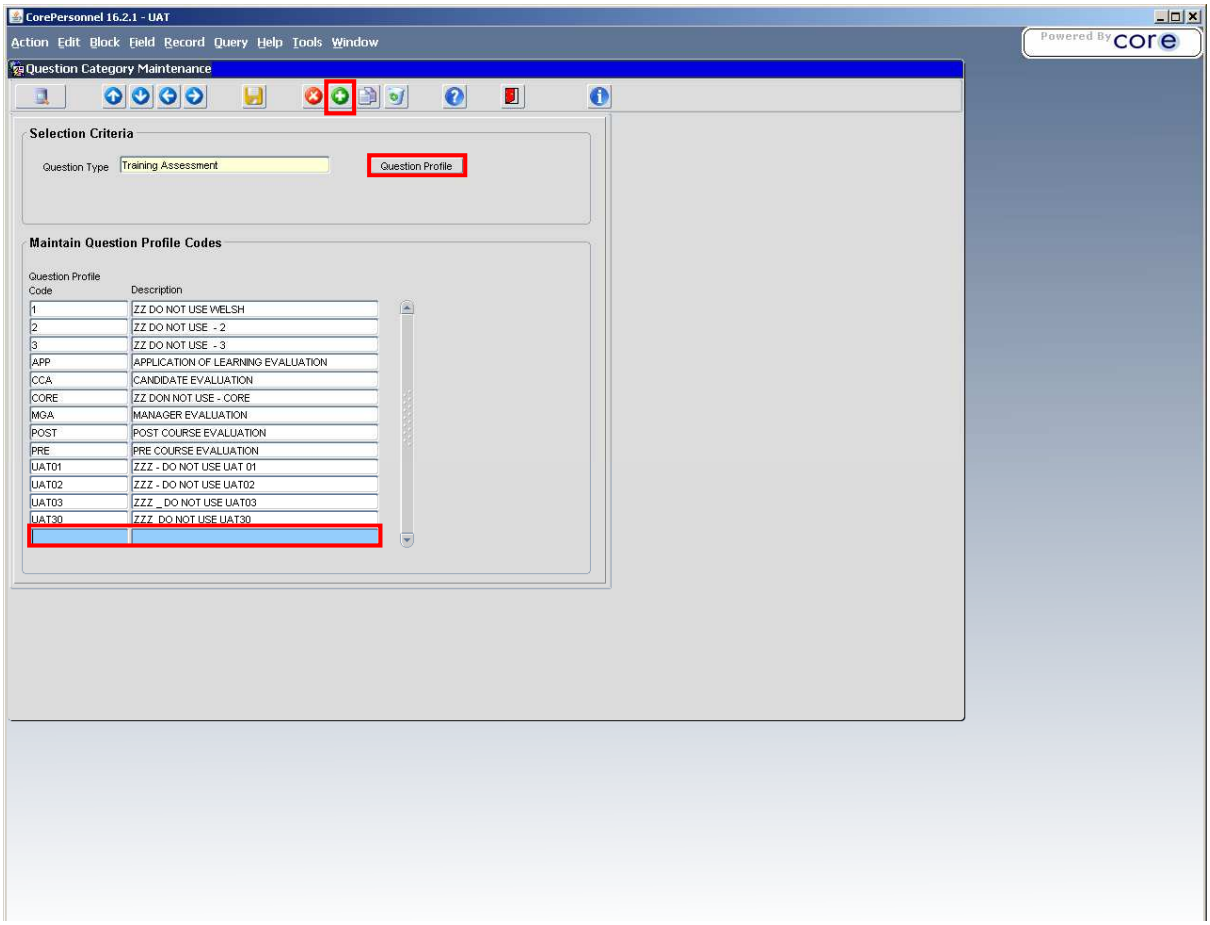


2) Click the Insert new record button or click into the 1st blank row in the **Maintain Question Profile Codes** table.

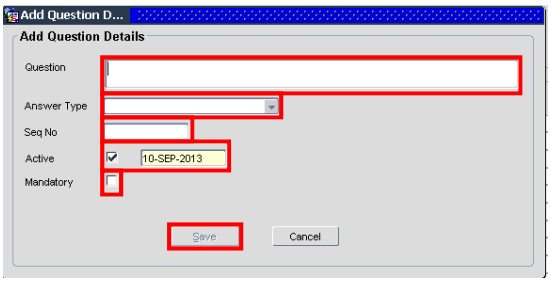
3) Enter a Question Profile Code and a Description (i.e. a title for your evaluation questionnaire).

4) Click **Save**.

5) Click **Question Profile**. The **Question Profile** screen displays.


CorePersonnel 16.2.1 - UAT
Action Edit Block Field Record Query Help Tools Window
Powered By core
Question Category Maintenance
Selection Criteria
Question Type
Training Assessment
Question Profile
Maintain Question Profile Codes
Question Profile Code
Description
1 ZZ DO NOT USE WELSH
2 ZZ DO NOT USE - 2
3 ZZ DO NOT USE - 3
APP APPLICATION OF LEARNING EVALUATION
CCA CANDIDATE EVALUATION
CORE ZZ DON NOT USE - CORE
MGA MANAGER EVALUATION
POST POST COURSE EVALUATION
PRE PRE COURSE EVALUATION
UAT01 ZZZ - DO NOT USE UAT 01
UAT02 ZZZ - DO NOT USE UAT02
UAT03 ZZZ _ DO NOT USE UAT03
UAT30 ZZZ_DO NOT USE UAT30

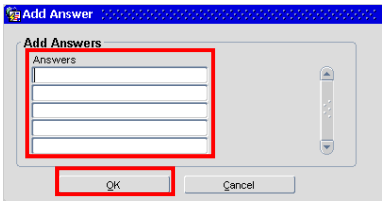
6) Click **Add Question**. The **Add Question Details** screen displays.



7) Enter the question you would like the candidate to answer.

8) Select the **Answer Type** from the drop down list. This will determine the format of the question the candidate will be presented with when answering the question. There are 5 answer types to choose from.

i. Dropdown List — The candidate is prompted to choose one answer from a drop down list of predefined options. When selecting this answer type the Add Answer screen displays to enable you to enter the predefined answers. Spaces for 5 possible answers are displayed by default. To enter more than 5 possible answers press the down arrow key on your keyboard for each additional answer you wish to enter.



ii. Free Text — The candidate is promoted to enter free text comments.

iii. Numeric — The candidate is prompted to respond in a numerical format.

iv. Radio Buttons — The candidate is prompted to choose one answer from a range of pre-defined radio buttons. A maximum of 5 possible answers can be pre-defined. When selecting this answer type the Add Answer screen displays to enable you to enter the predefined answers.

v. Yes/No — The candidate is prompted to tick a box to indicate if the answer to the question is Yes or No.

9) Enter the **Seq No** (sequence number) to define the order in which the questions are to be displayed to candidates (e.g. the 1st question should be given a Seq No of 1, the 2nd question a Seq No of 2, etc.).

10) Ensure the **Active** indicator check box is checked to include the question in the pool of questions to be made available to candidates. The Active indicator can later be unchecked if you wish to remove one question from a pool without having to create the questionnaire again.

11) Check the Mandatory indicator check box if you want the candidate to be required to provide an answer to the question. Leaving the check box blank will mean that the question is optional.

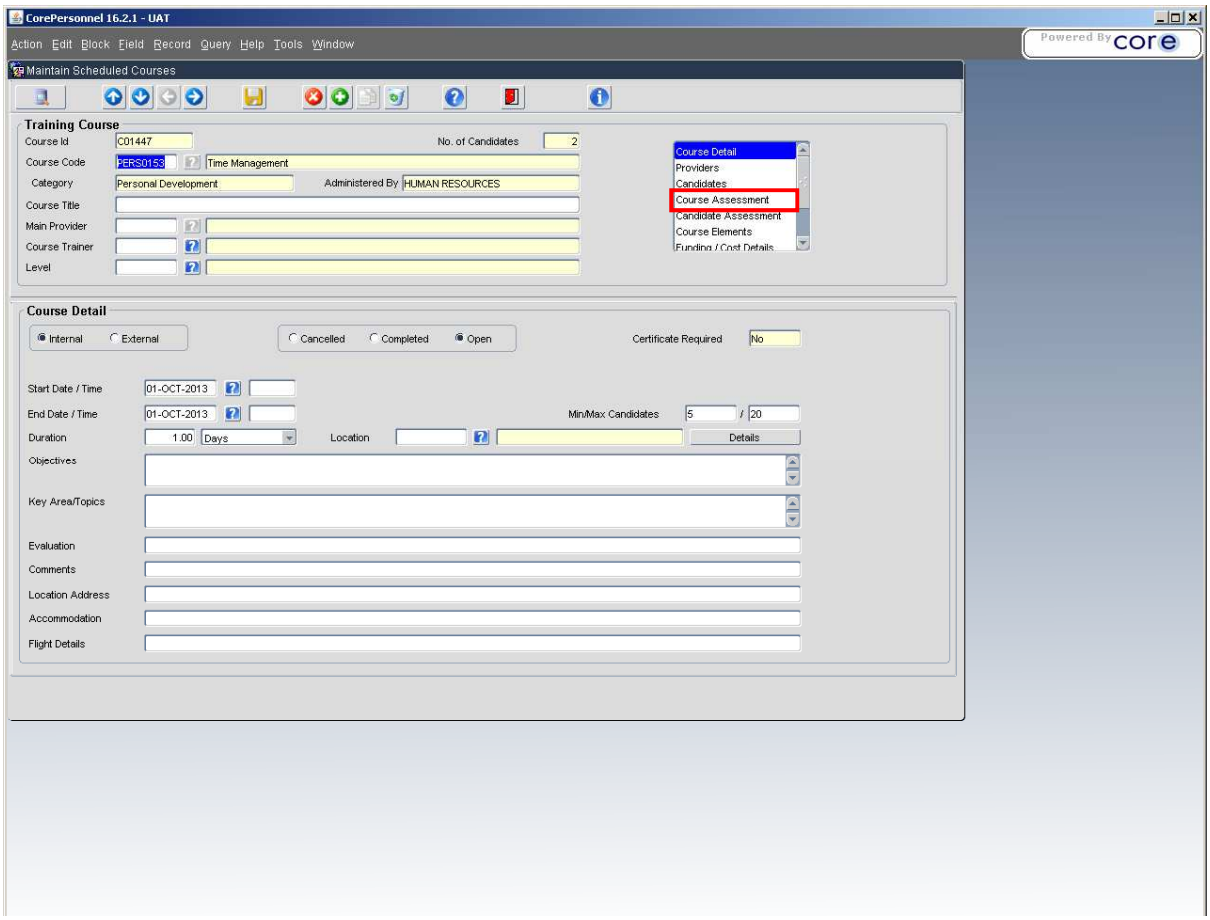
12) Click **Save**. The Add Question Details screen closes.

13) Click the **Exit** button on the toolbar to return to the main menu.

Deploying an Evaluation Questionnaire

Once an evaluation questionnaire is created it can be deployed against a specific event so that it is available for candidates or their line managers to complete either before or after the course.

1) Select **Course Assessment** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Select Assessment Category** table displays.



2) Enter a description for the evaluation questionnaire (e.g. Post Course Evaluation Questionnaire).

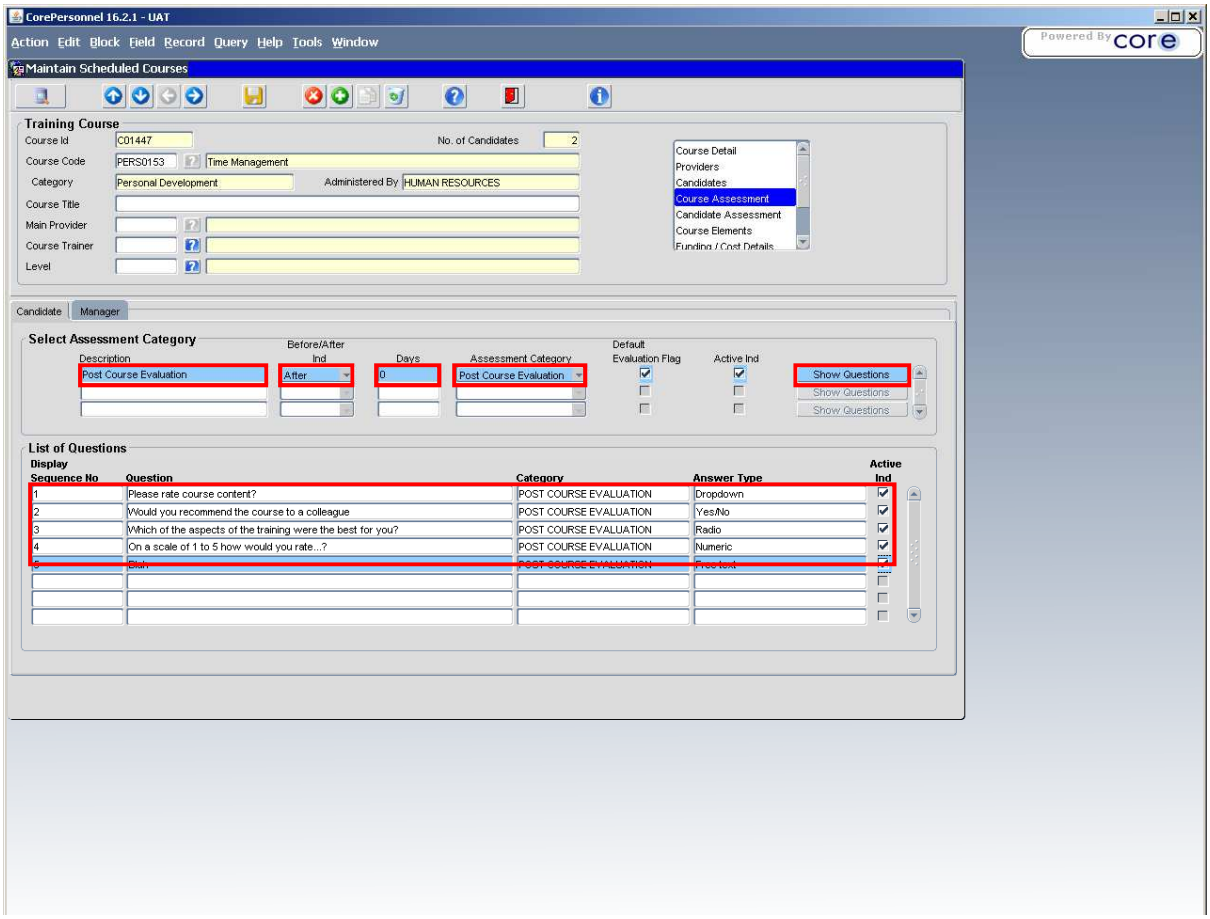
3) Select **Before** or **After** from the Before/After Ind drop down box to determine whether you want the evaluation questionnaire to be available before or after the course.

4) Enter a number of days to determine the period before or after the course you want the evaluation questionnaire to be available from.

5) Select the question profile you wish to deploy from the Assessment Category drop down box.

6) Click **Show Questions**. The questions which comprise the selected question profile display in the List of Questions table.

7) Check the **Active Ind** check box corresponding to each question you wish to deploy as part of the evaluation questionnaire. By default, all questions in the question profile are considered active but individual questions can be made inactive if they are not required.



8) Repeat steps 2 to 7 above if you wish to make additional evaluation questionnaires available to candidates (e.g. to add a pre course evaluation questionnaire or an evaluation questionnaire to be completed 6 months post completion of the course.

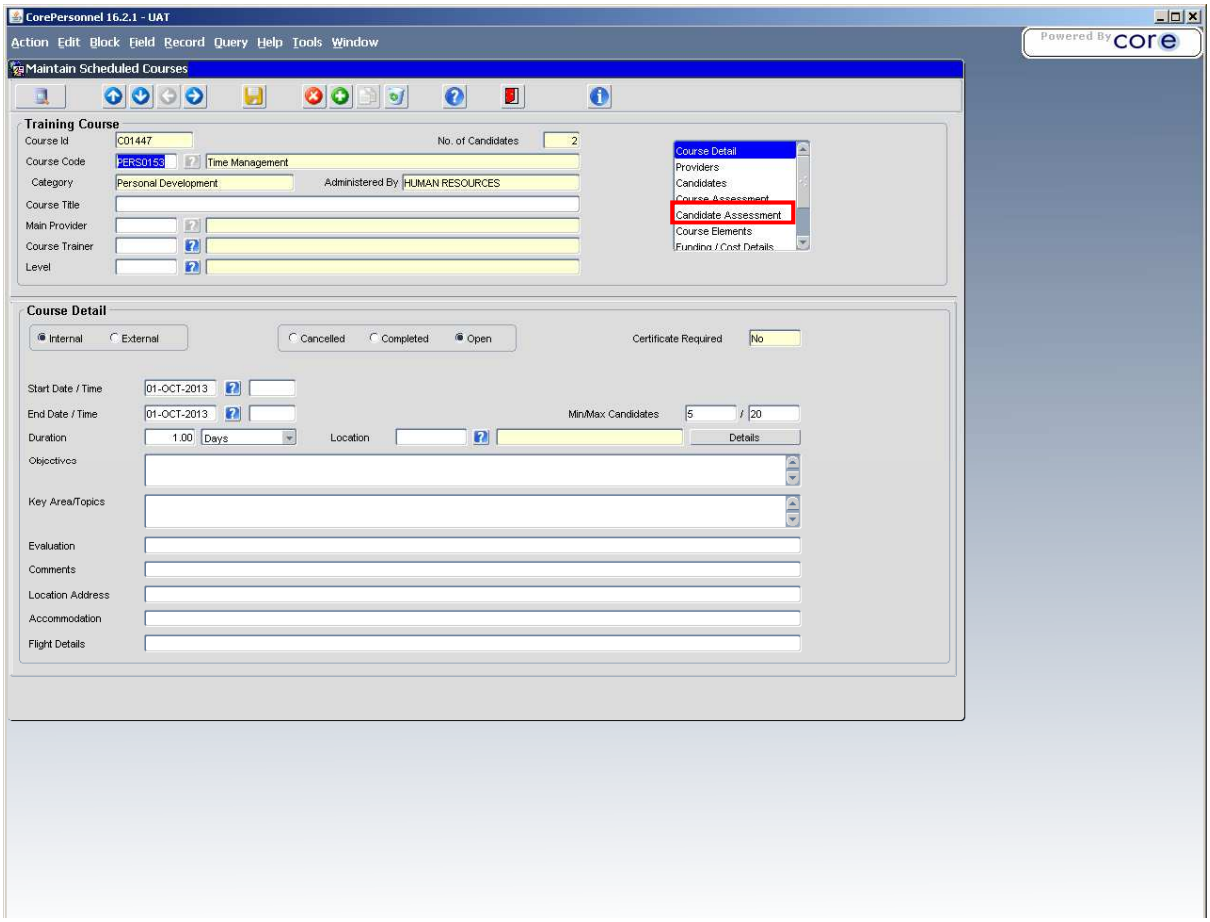
9) Click on the **Manager** tab and repeat steps 2 to 7 above if you wish to make an evaluation questionnaire available to candidates' line managers (e.g. to evaluate the impact of training in the workplace).

10) Click the **Exit** button on the toolbar to return to the main menu.

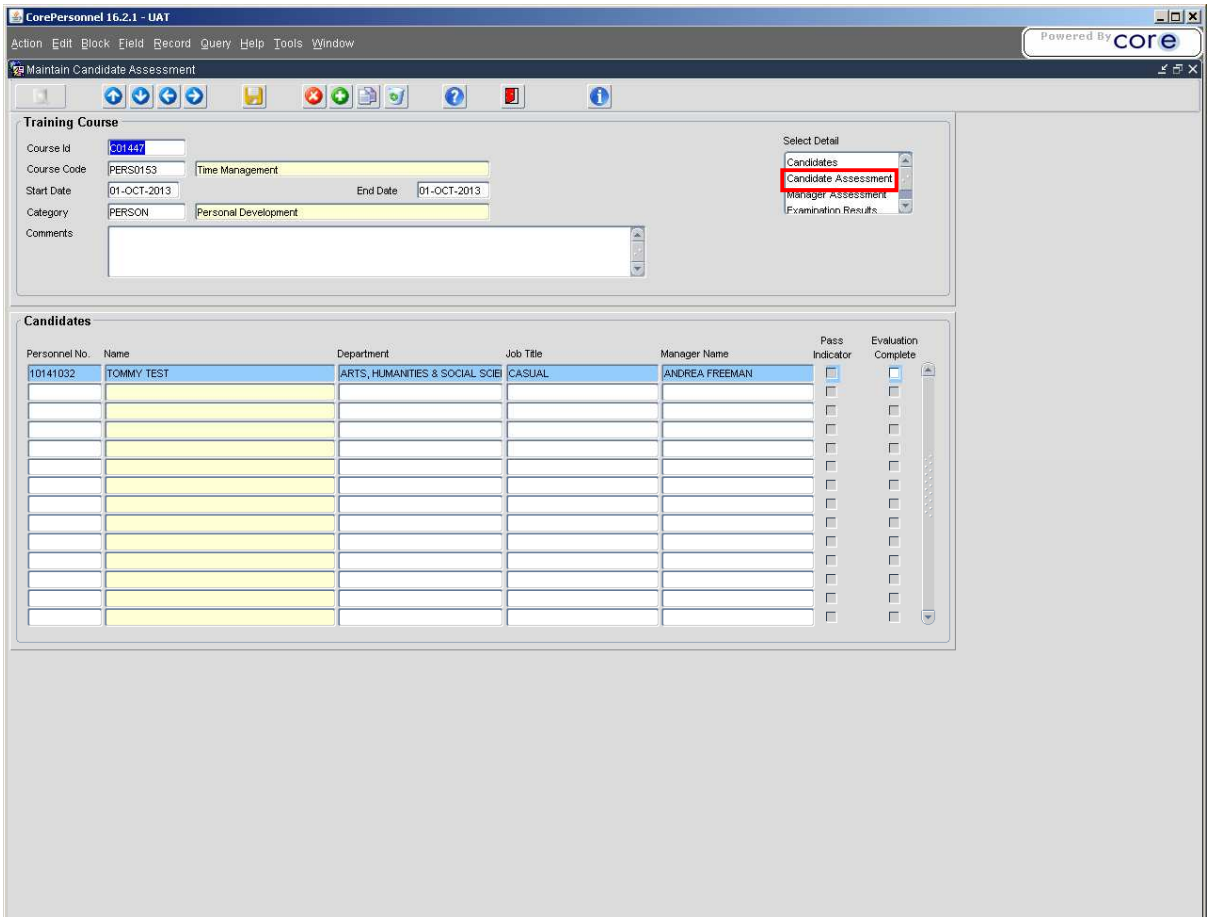
Complete an Evaluation Questionnaire on behalf of a Candidate or Manager

Candidates and managers can complete evaluation questionnaires via Portal. Back office administrators can also enter completed questionnaires on behalf of a candidate or their line manager where the person concerned is unable to complete the questionnaire online.

1) Select **Candidate Assessment** from the Select Detail menu in the top right-hand corner of the screen. The **Maintain Candidate Assessment** screen displays.



2) Click on the candidate in the Candidates table you wish to complete an evaluation questionnaire on behalf of. The Candidates details are highlighted blue.


CorePersonnel 16.2.1 - UAT
Action Edit Block Field Record Query Help Tools Window
Powered By core
Maintain Candidate Assessment
Training Course
Course Id 201447
Course Code PERS0153 Time Management
Start Date 01-OCT-2013 End Date 01-OCT-2013
Category PERSON Personal Development
Comments
Select Detail
Candidates
Candidate Assessment
Manager Assessment
Examination Results
Candidates
Personnel No. Name Department Job Title Manager Name Pass Indicator Evaluation Complete
10141032 TOMMY TEST ARTS, HUMANITIES & SOCIAL SCIE CASUAL ANDREA FREEMAN

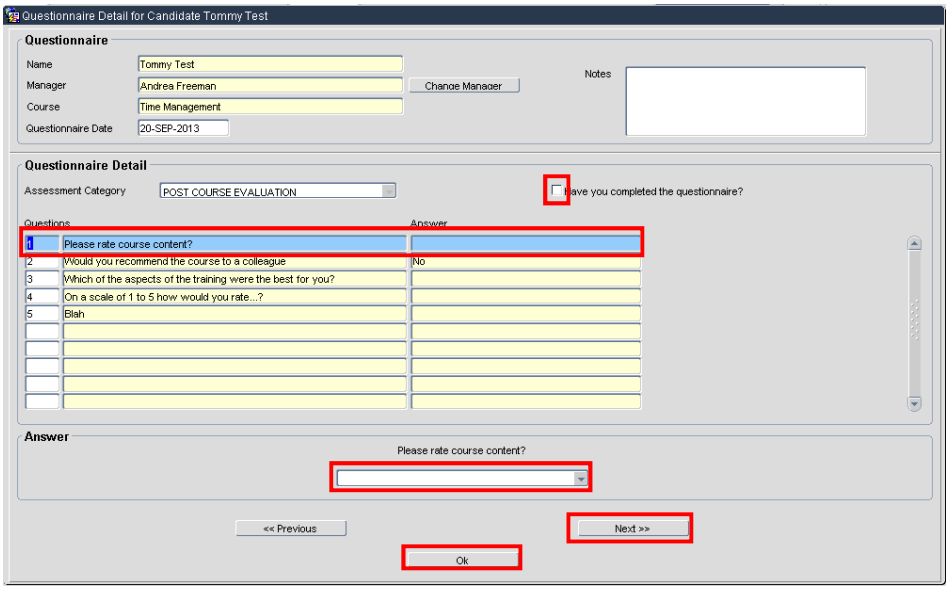
3) Click on either **Candidate Assessment** or **Manager Assessment** in the Select Detail menu to complete an evaluation questionnaire on behalf of either the candidate or their line manager. The **Questionnaire Detail for Candidate [Candidate Name]** screen displays.

4) Click on the first question in the Questions table. The question is highlighted blue.

5) Enter responses for each question on behalf of either the candidate or their line manager. Click **Next** to proceed to the next question.

6) Once you have entered a response for all relevant questions check the **Have you completed the questionnaire?** check box.

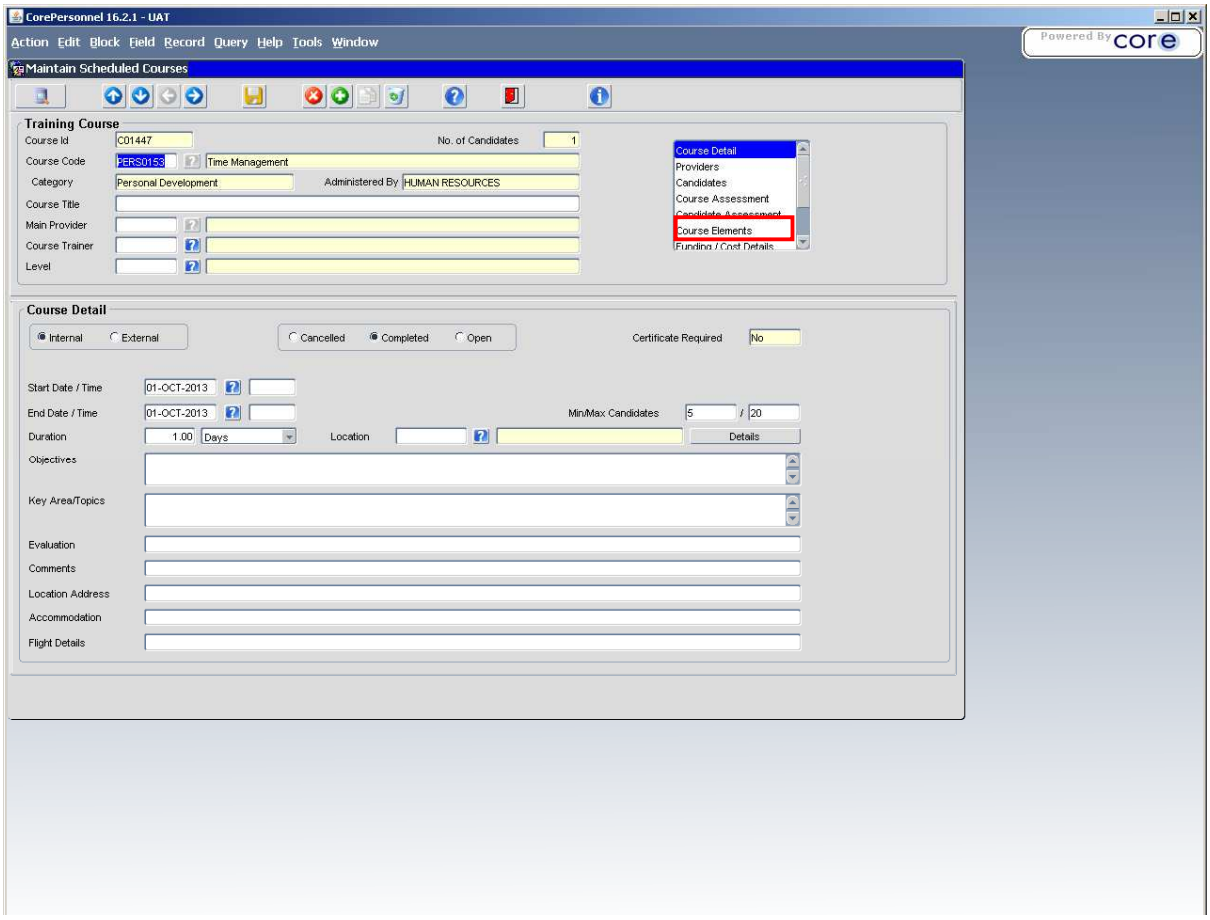
7) Click **OK**. The Questionnaire Detail for Candidate [Candidate Name] screen closes.



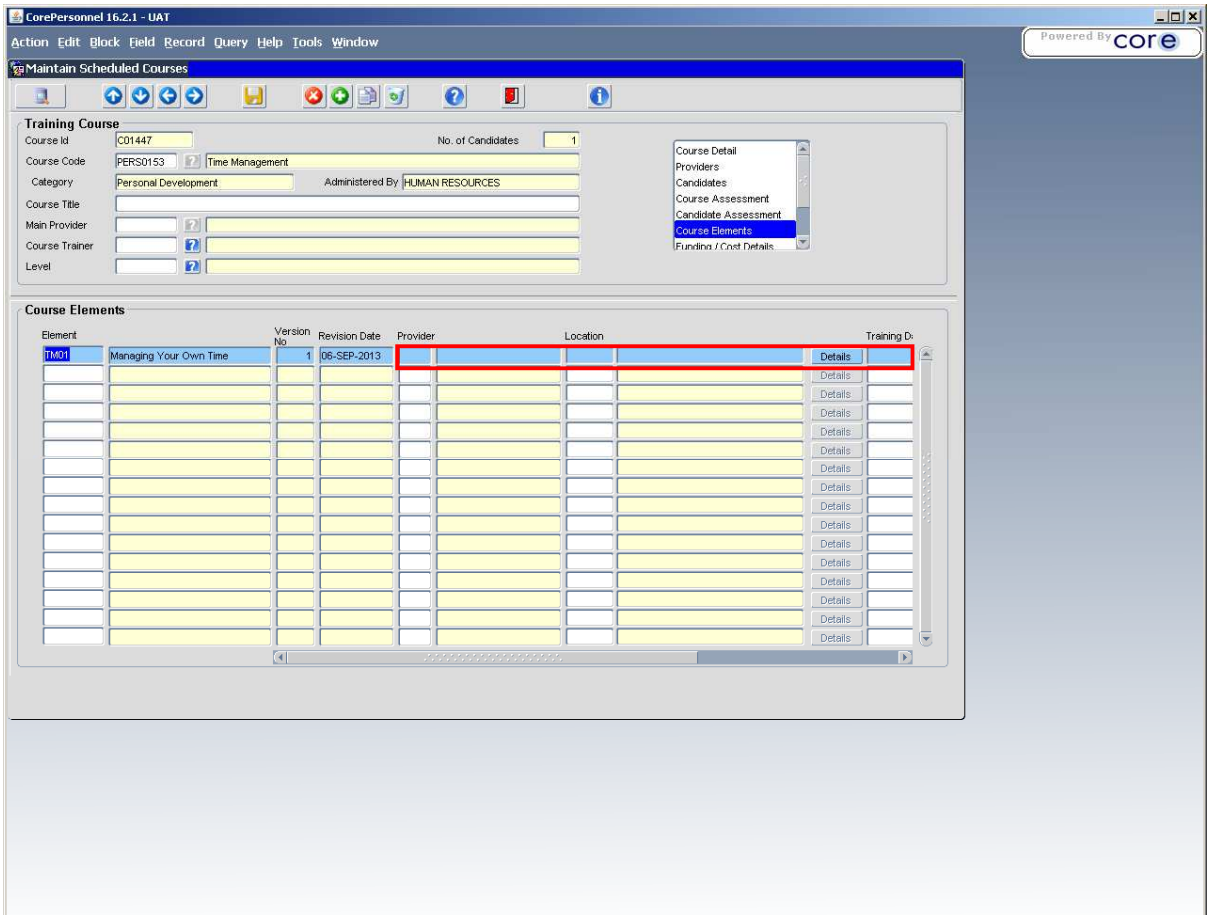
8) Click the **Exit** button on the toolbar to return to the main menu.

Record Completion of Elements/ Modules

1) Select **Course Elements** from the Select Detail menu in the top right-hand corner of the screen. The **Course Elements** table displays.

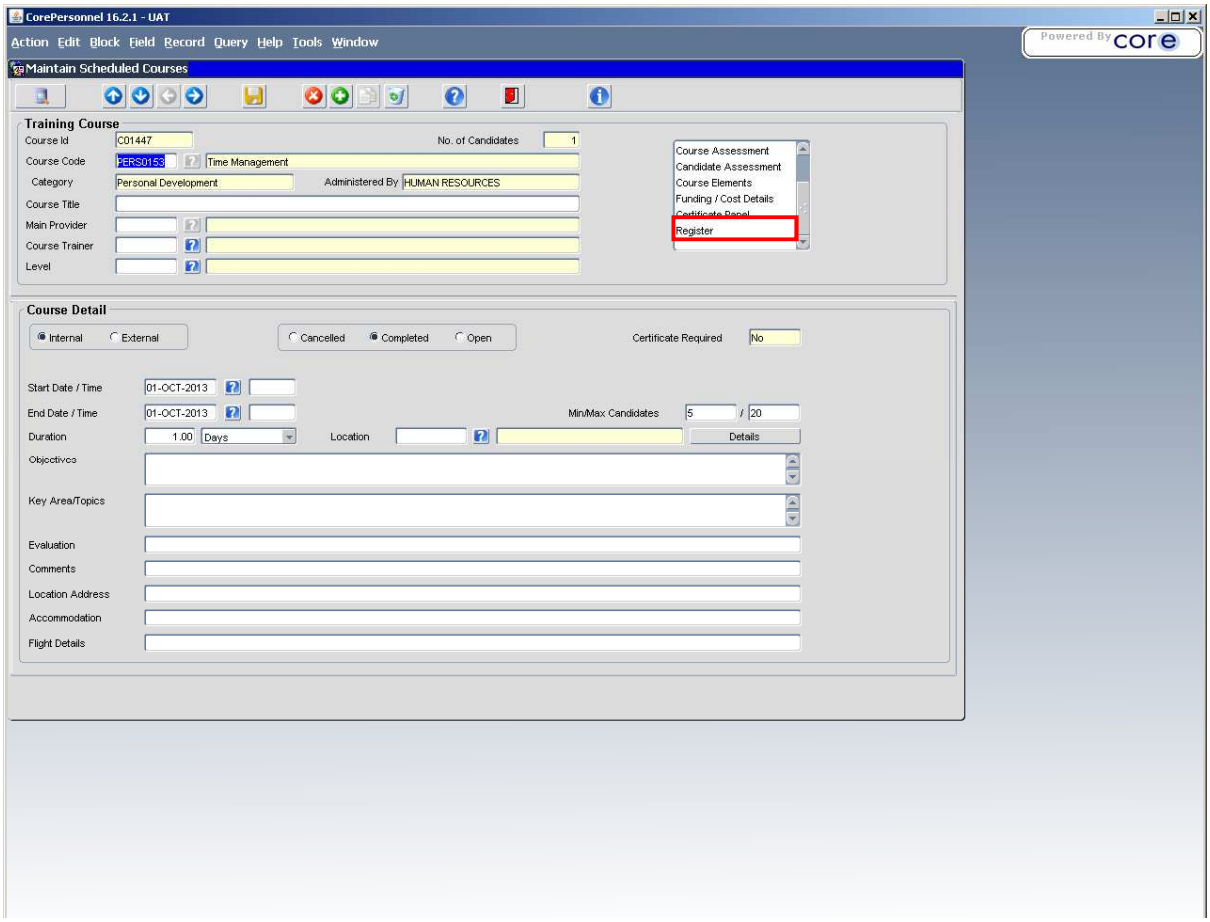


2) Complete the available fields as necessary including: Provider, Location, Training Date, Start/End Time, Session and Level. The Training Date field must be completed for each element in order to use the Register function.

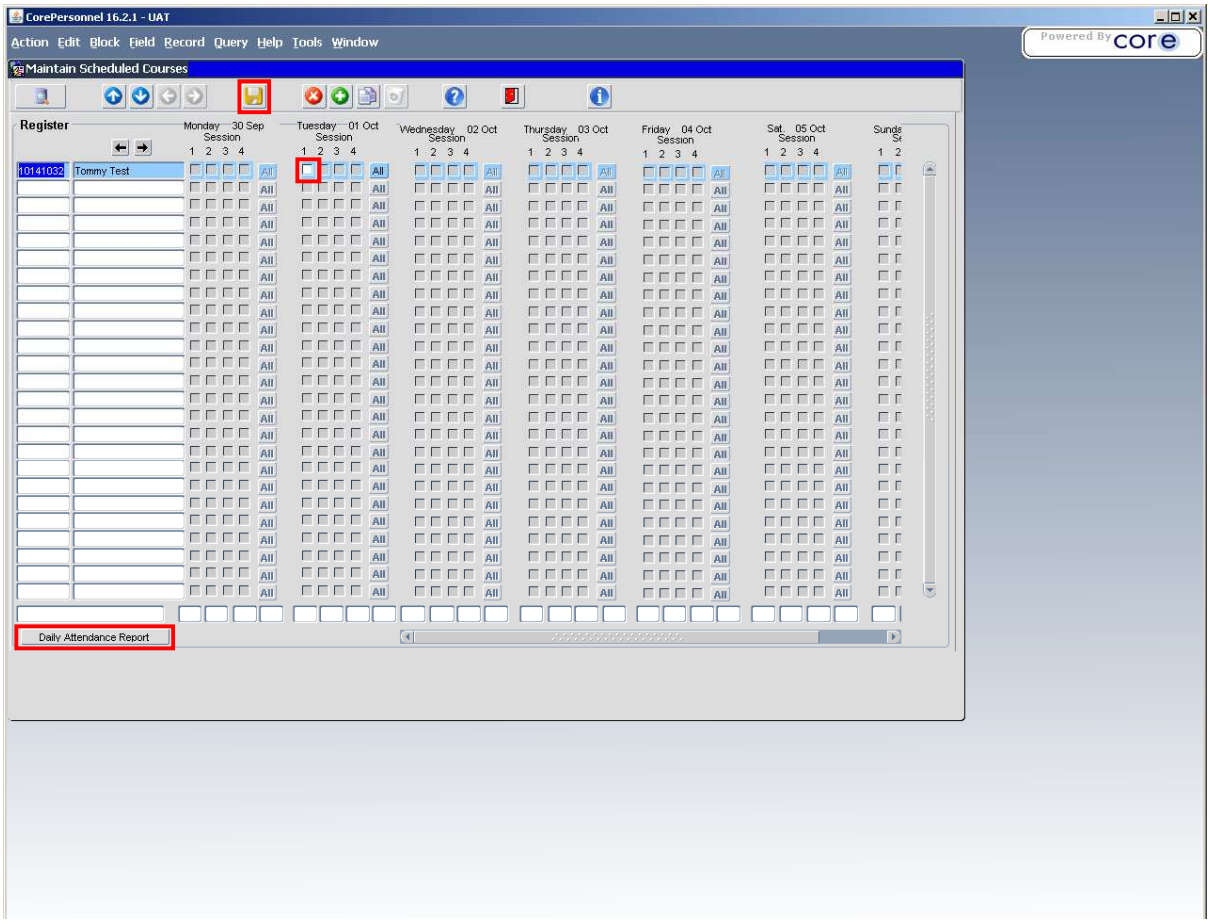

CorePersonnel 16.2.1 - UAT
Action Edit Block Field Record Query Help Tools Window
Powered By core
Maintain Scheduled Courses
Training Course
Course Id C01447
No. of Candidates 1
Course Code PERS0153 Time Management
Category Personal Development
Administered By HUMAN RESOURCES
Course Title
Main Provider
Course Trainer
Level
Course Detail
Providers
Candidates
Course Assessment
Candidate Assessment
Course Elements
Funding / Cost Details
Course Elements
Element
Version No
Revision Date
Provider
Location
Training D
TM01 Managing Your Own Time 1 06-SEP-2013 Details

Register

1) To enter daily attendance records for each candidate, select **Register** from the Select Detail menu in the top right-hand corner of the screen. The Register screen displays.



2) To mark a candidate as having attended a training session, click on the checkbox for the relevant day.



3) Click **Save** .

4) To generate a Daily Attendance Report for a particular week, scroll to the relevant week and click the **Daily Attendance Report** button on the bottom left hand side of the screen. The Daily Attendance Report displays.

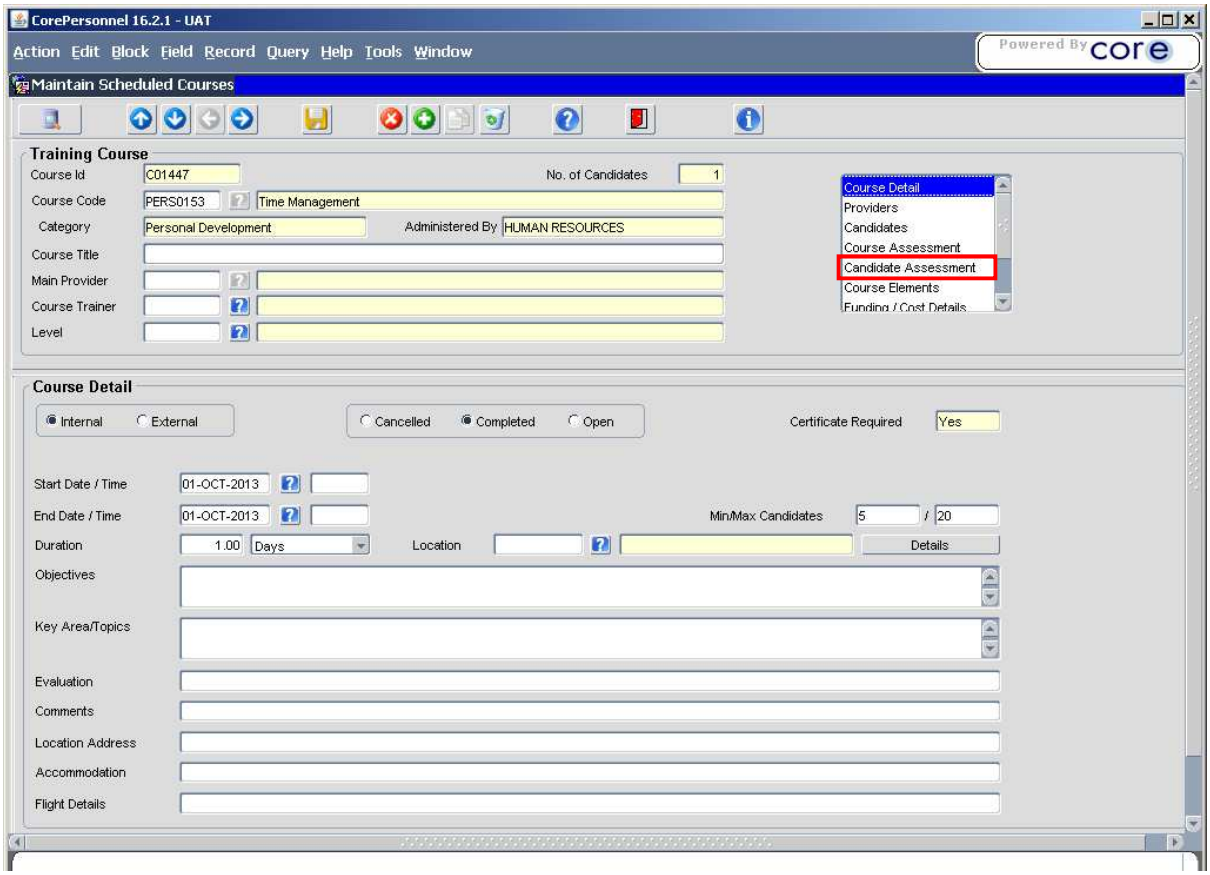
5) Click the **Exit** button on the toolbar to return to the main menu.

Candidate Assessment

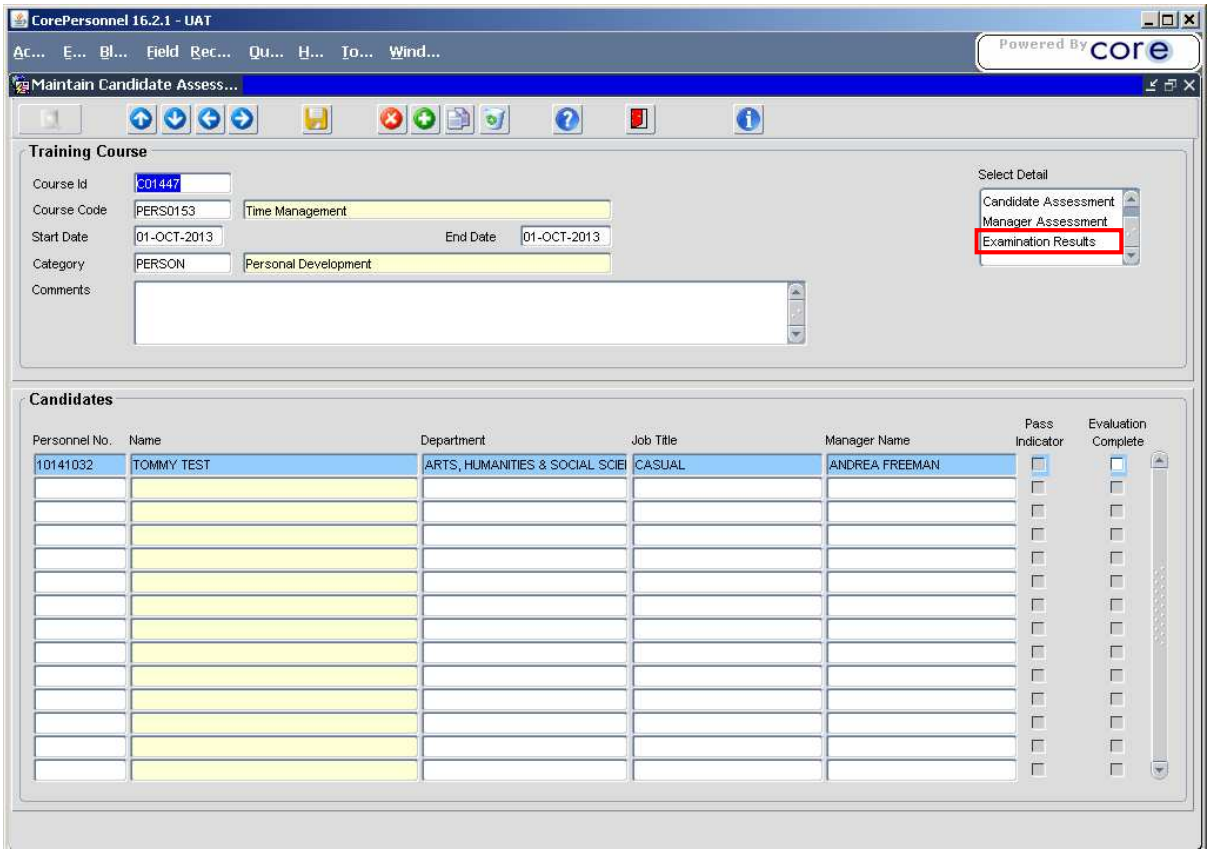
Examination Results

Before you are able to enter exam results you will need to be assigned a PIN number. Please contact Human Resources on 02920 879777 or at people@cardiff.ac.uk to request a PIN.

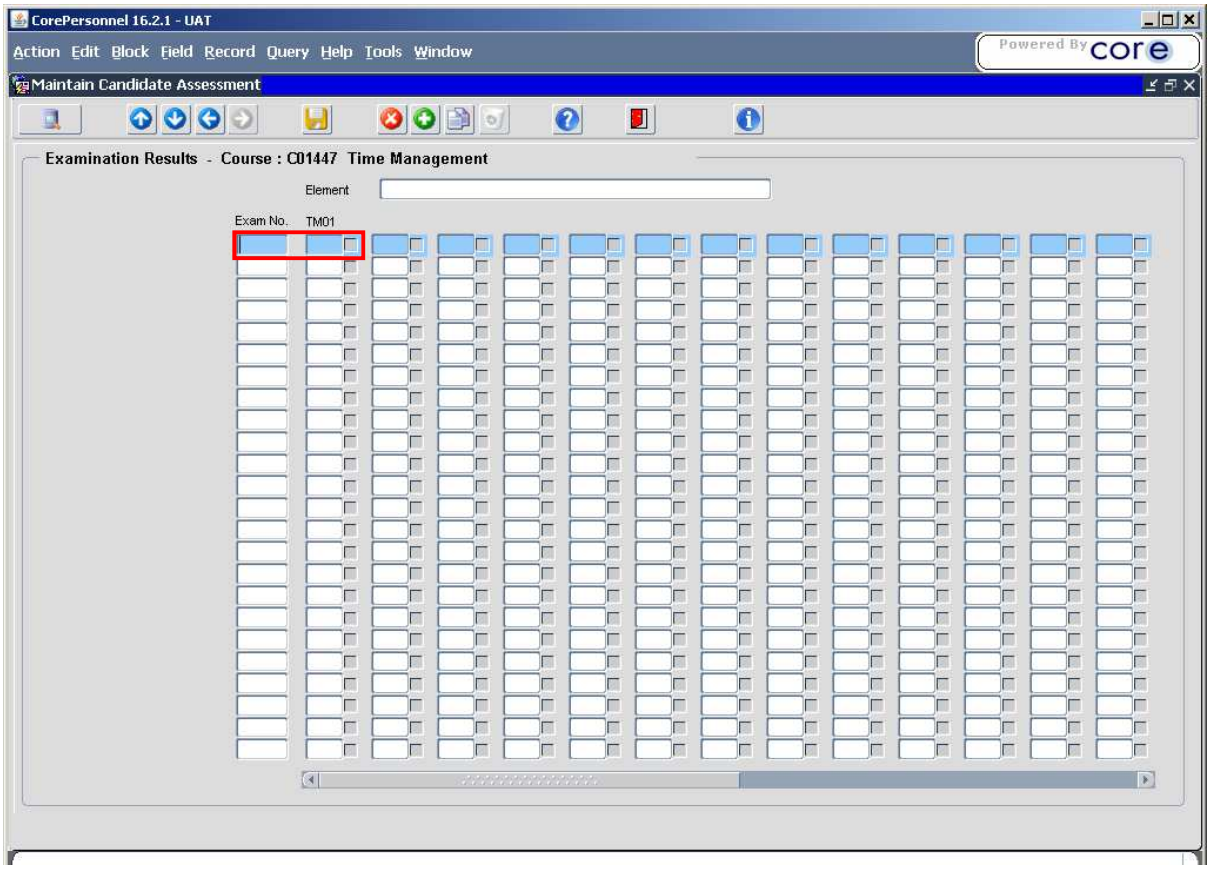
1) To enter examination/ test results for each candidate, select **Candidate Assessment** from the Select Detail menu in the top right-hand corner of the screen. The **Maintain Candidate Assessment** screen displays.



2) Select **Examination Results** from the select detail menu. The Examination Results screen displays.

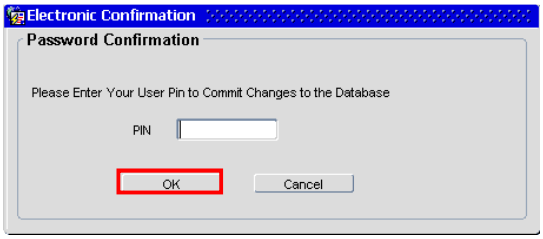


3) Click into the first candidate's record and enter results for each element as appropriate. When the candidate's result is greater than or equal to the pass level for that element, the pass checkbox is automatically ticked. The Password Confirmation window displays.



4) Enter your pin number.

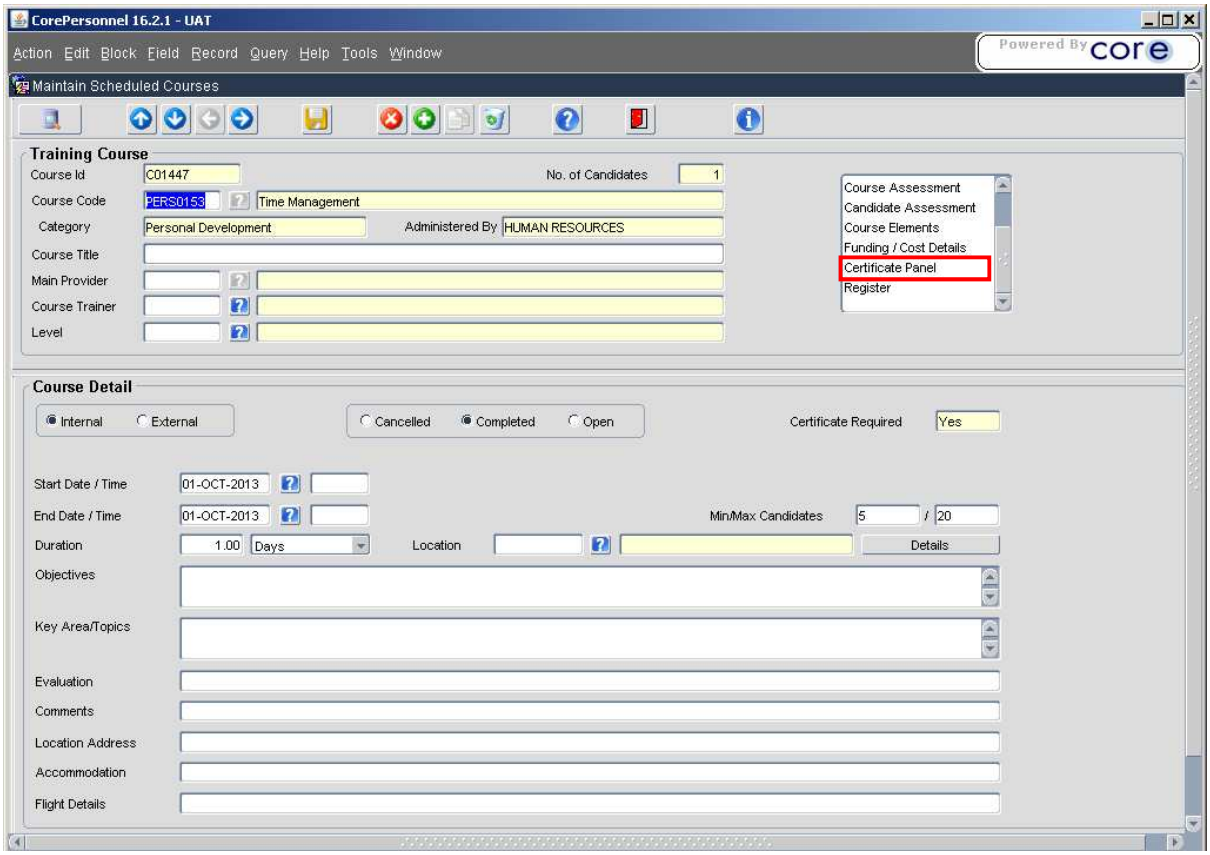
5) Click **OK**.



Issuing Certificates

The Core Training module contains the functionality to generate certificates for candidates that successfully complete a course. Before you are able to generate certificates you will need to have Training Certificate Parameters configured for you. Please contact Human Resources on 02920 879777 or at people@cardiff.ac.uk to request this.

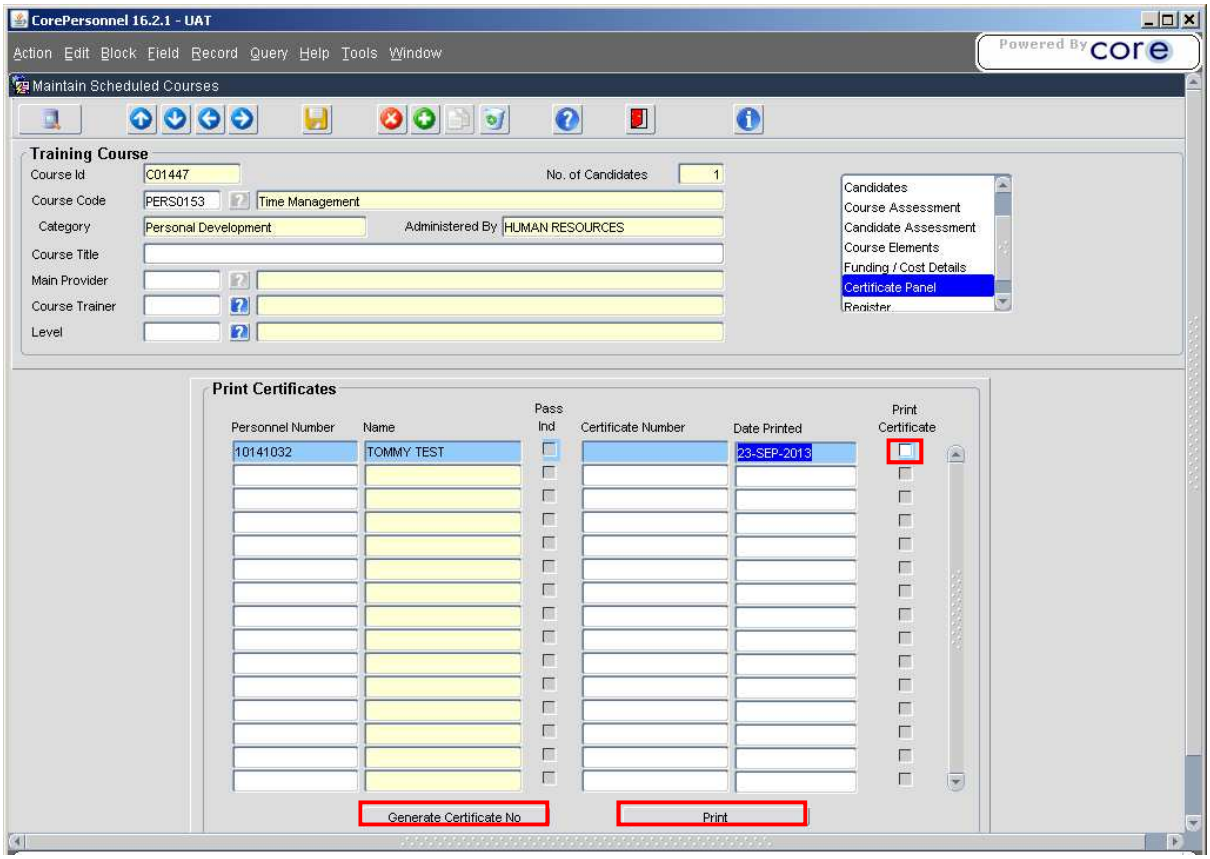
1) Select **Certificate Panel** from the Select Detail menu. The **Print Certificates** table displays.



2) Click **Generate Certificate Number**.

3) Check the **Print Certificate** box(es) which correspond to the candidates you wish to print certificates for.

4) Click **Print**.

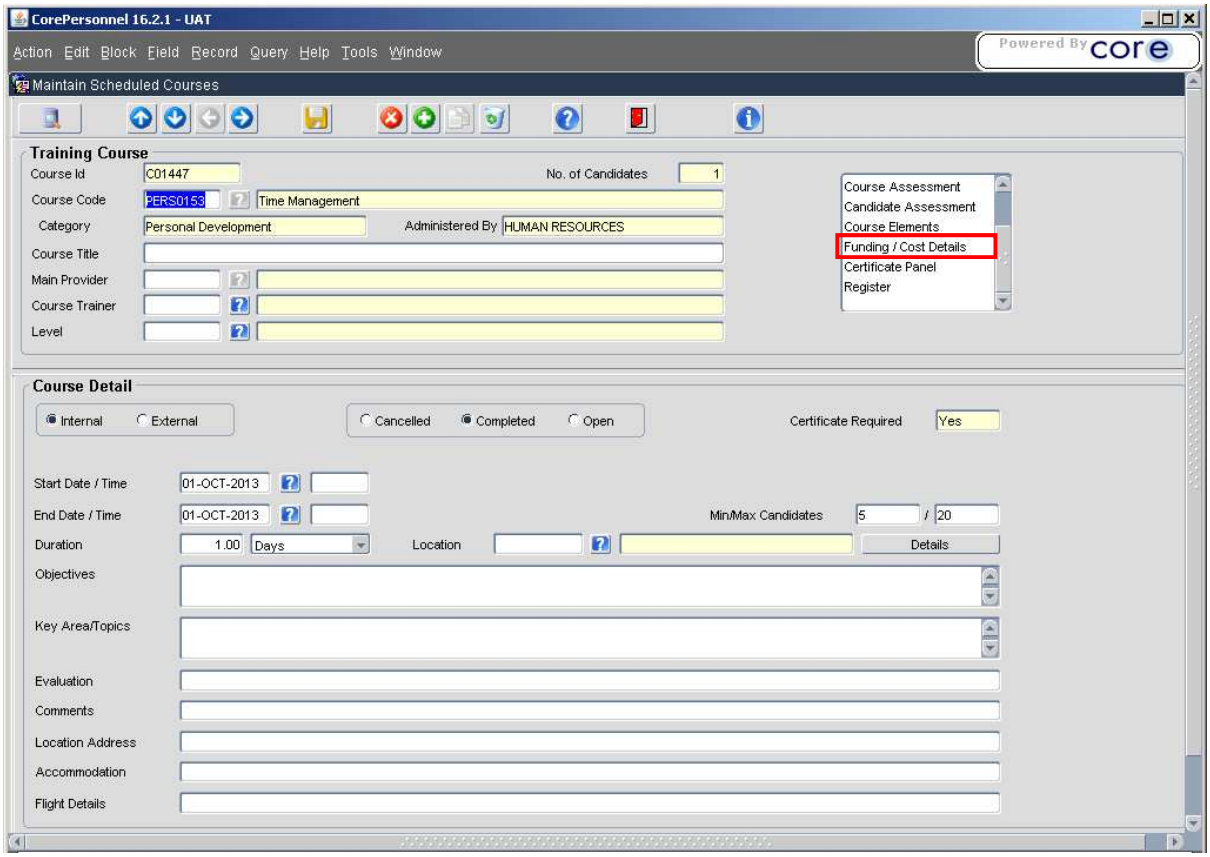


5) Click the **Exit** button on the toolbar to return to the main menu.

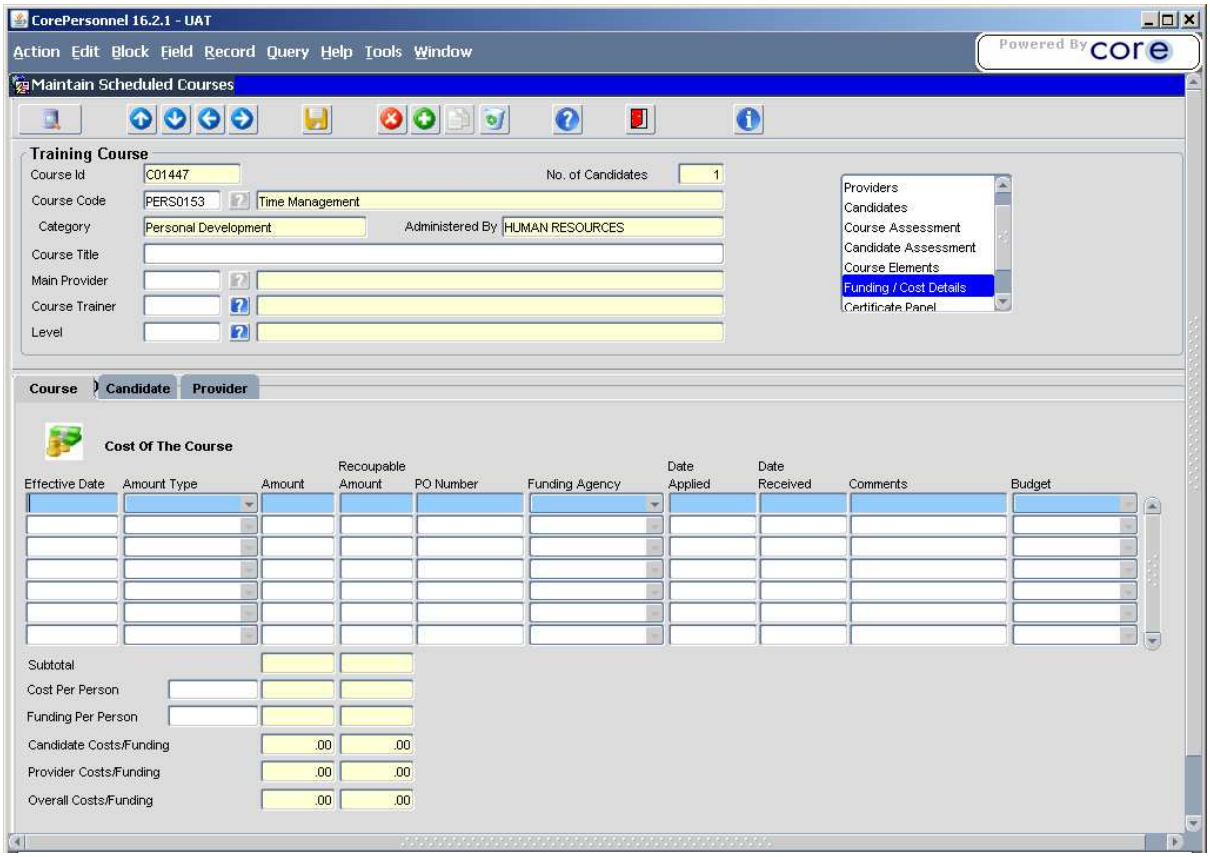
Funding/ Cost Details

Funding and cost details can be recorded against the course, candidate and provider.

1) Select **Funding / Cost Details** from the Select Detail menu. The **Cost of the Course** table displays.



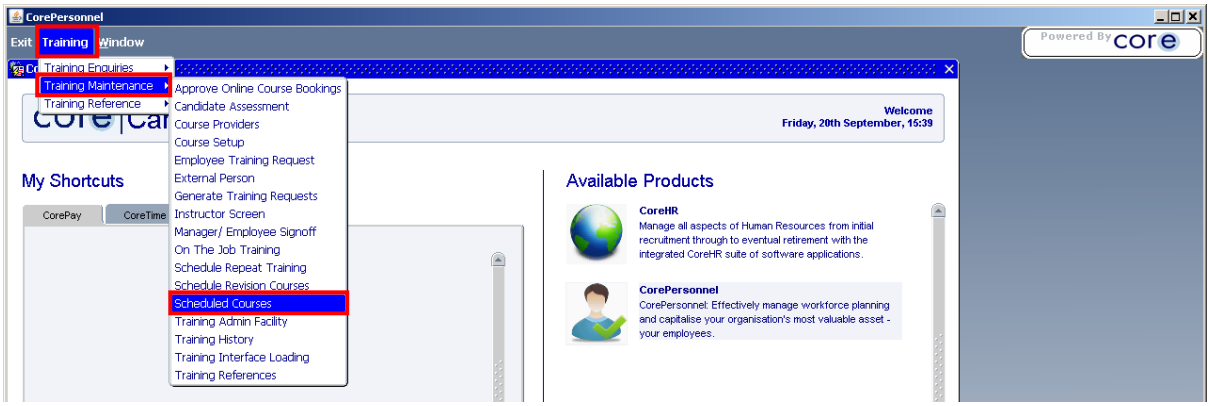
2) Costs can be entered for the Course, the Candidates and/ or the Provider as appropriate.


CorePersonnel 16.2.1 - UAT
Action Edit Block Field Record Query Help Tools Window
Powered By core
Maintain Scheduled Courses
Training Course
Course Id
C01447
No. of Candidates
1
Course Code
PERS0153
Time Management
Category
Personal Development
Administered By
HUMAN RESOURCES
Course Title
Main Provider
Course Trainer
Level
Providers
Candidates
Course Assessment
Candidate Assessment
Course Elements
Funding / Cost Details
Certificate Panel
Course
Candidate
Provider
Cost Of The Course
Effective Date
Amount Type
Amount
Recoupable Amount
PO Number
Funding Agency
Date Applied
Date Received
Comments
Budget
Subtotal
Cost Per Person
Funding Per Person
Candidate Costs/Funding
.00
.00
Provider Costs/Funding
.00
.00
Overall Costs/Funding
.00
.00

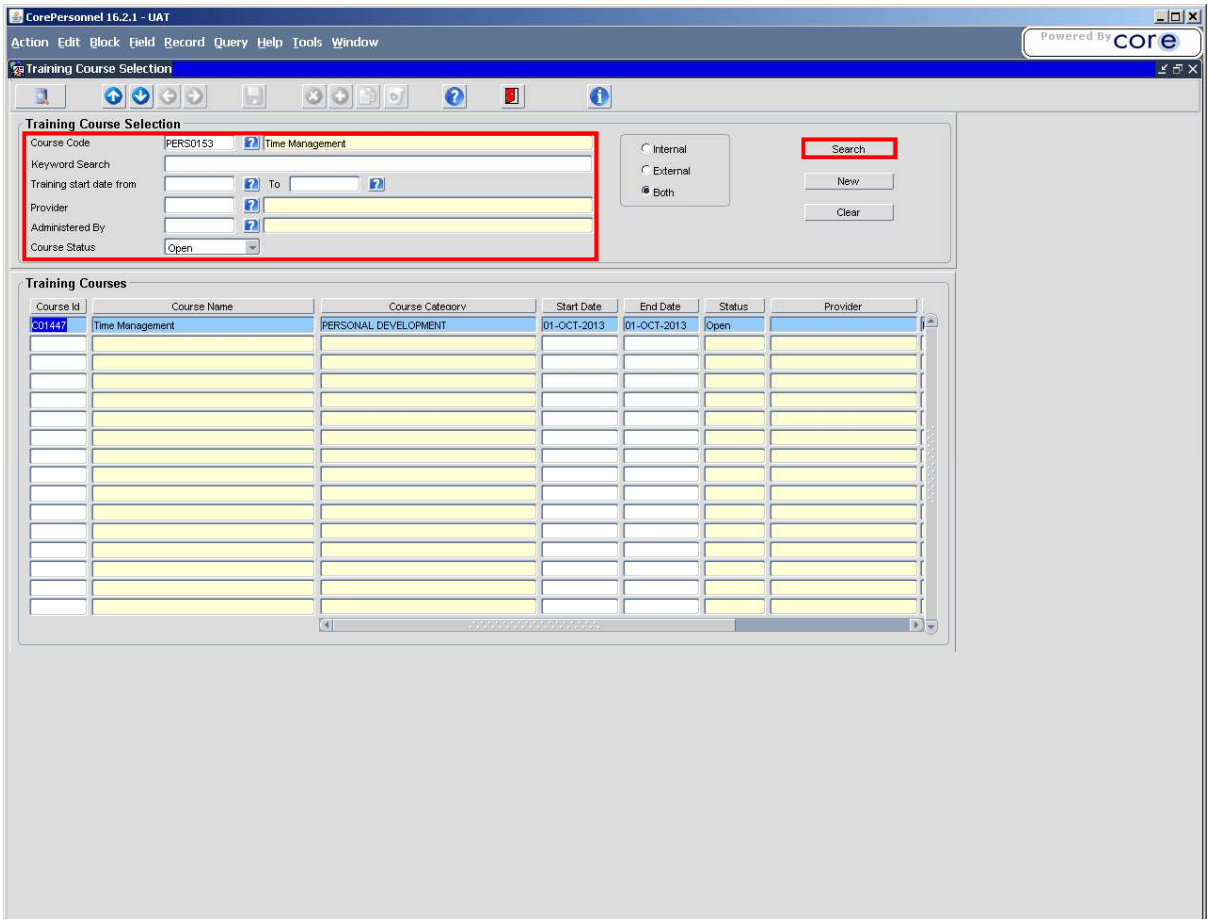
Mark Course as Completed

Following the completion of each event the training status of candidates should be updated to reflect the final outcome of training (e.g. Completed) and the Cancelled/ Completed/ Open indicator for the event as a whole should be amended.

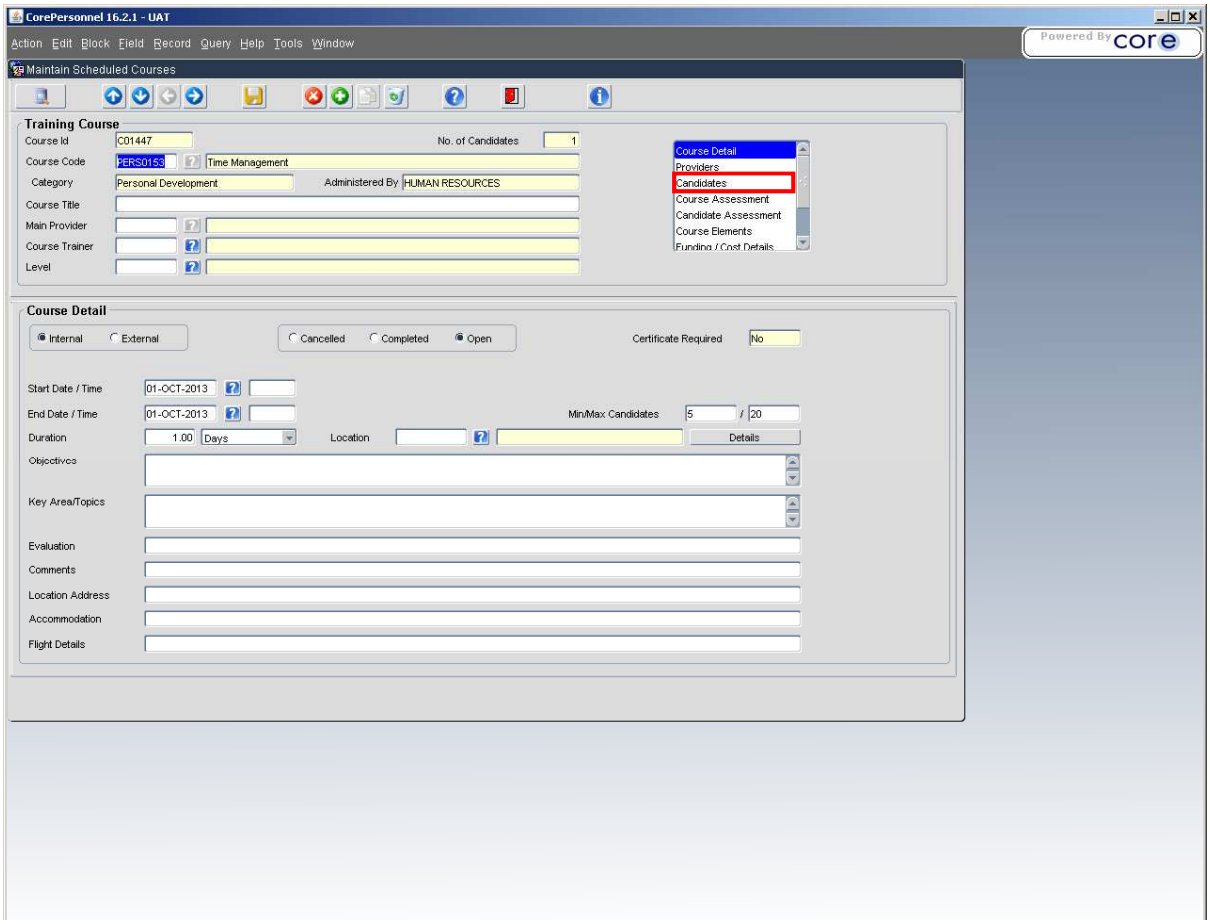
1) Select **Training → Training Maintenance → Scheduled Courses**. The **Training Course Selection** screen listing all events displays.



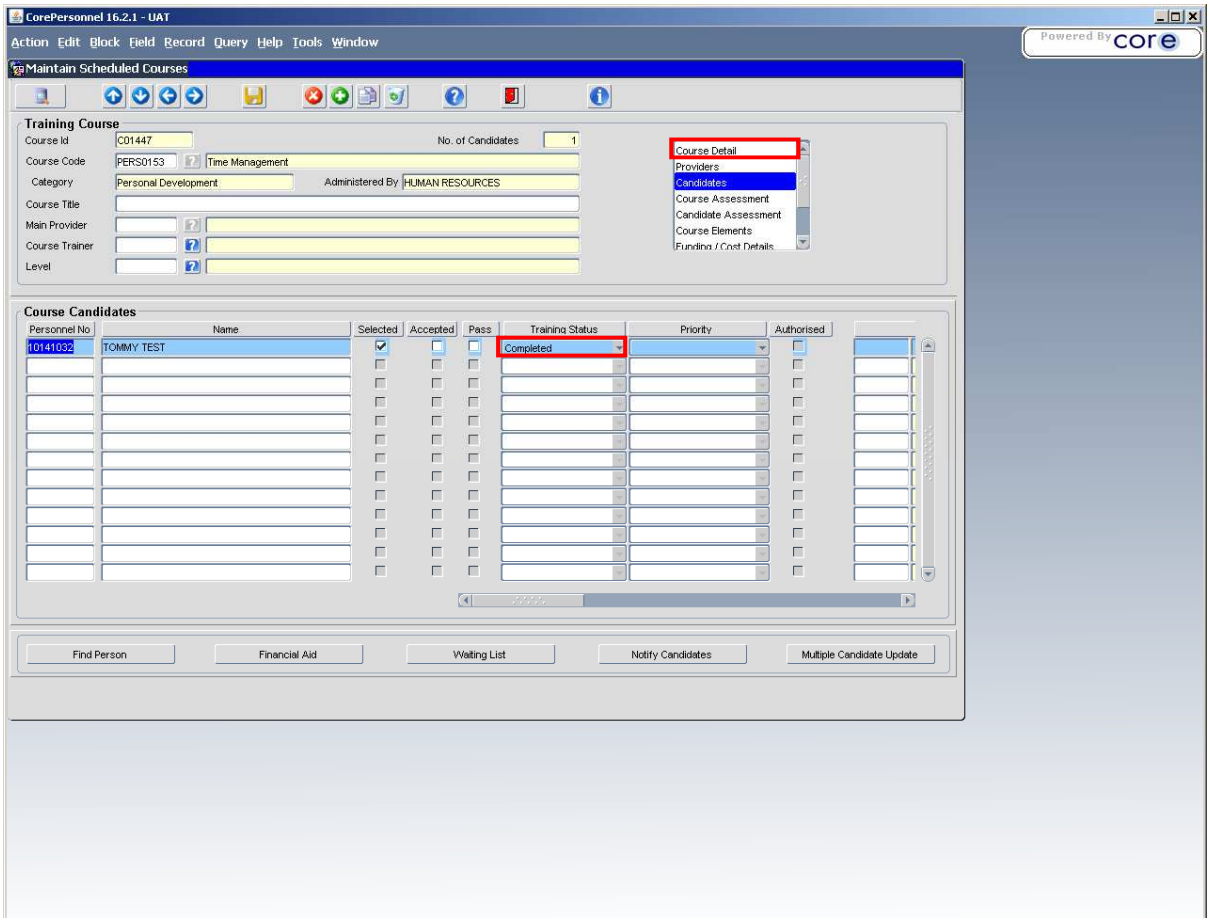
2) Select the event either by using the selection criteria or scrolling down the list of events. Double click on the course. The **Maintain Scheduled Courses** screen displays.



3) Select **Candidates** from the Select Detail menu in the top right-hand corner of the screen. The **Course Candidates** table displays.

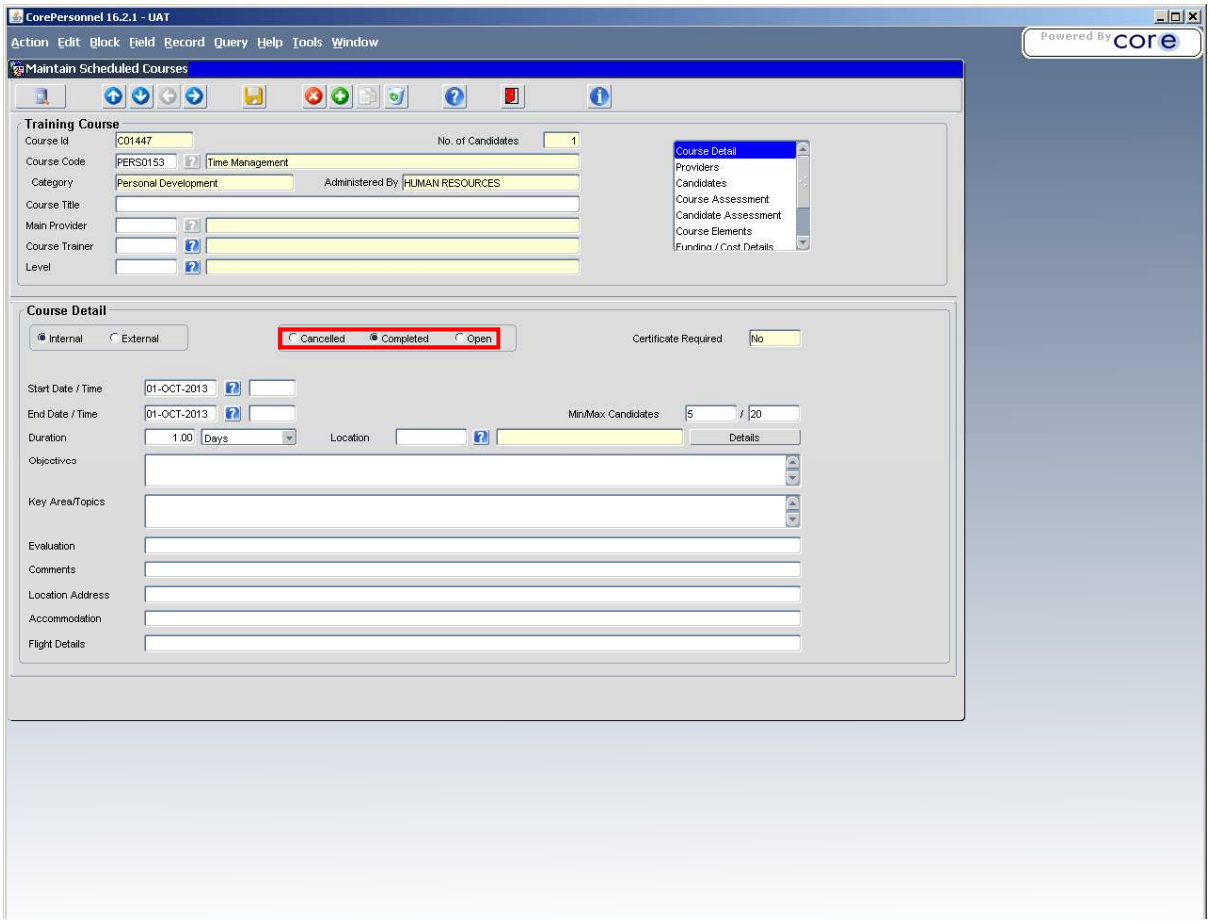


4) Update each candidates Training Status to reflect the final outcome of training (e.g. Completed). Alternatively, use the **Multiple Candidate Update** function to update the Training Status for more than one candidate at a time (see page 76).



5) Select **Course Detail** from the Select Detail menu. The **Course Detail** screen displays.

7) Click the **Completed** or **Cancelled** check box as appropriate. These check boxes form part of the Cancelled/ Completed/ Open indicator.



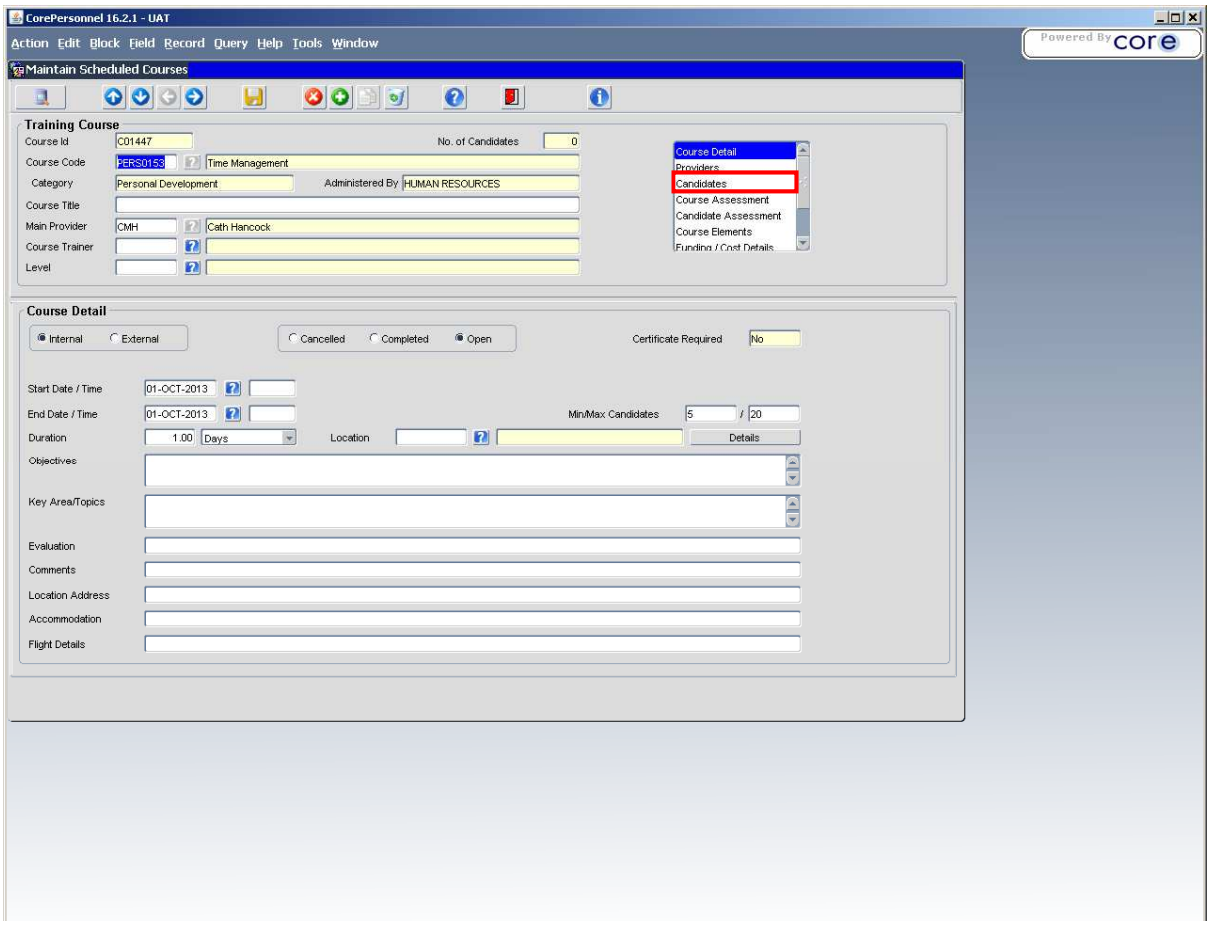
8) Click **Save** .

9) Click the **Exit** button on the toolbar to return to the main menu.

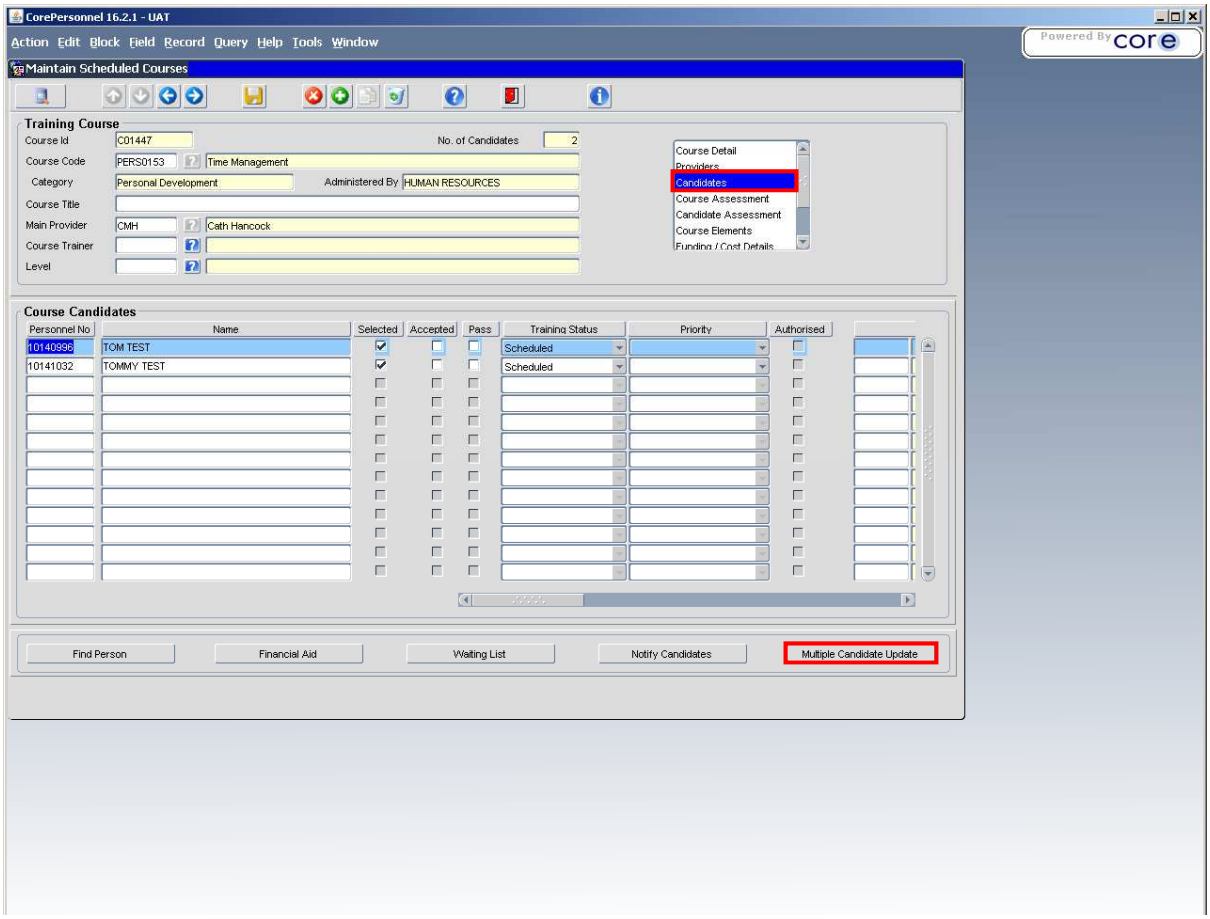
Multiple Candidate Update

The Multiple Candidate Update option allows a group of candidates on a particular status to be changed in bulk as opposed to manually changing the status of each candidate individually.

1) Select **Candidates** from the Select Detail menu on the Maintain Scheduled Courses screen. The **Course Candidates** table displays.



2) Click the **Multiple Candidate Update** button. The **Update Candidate Training Status** screen displays.

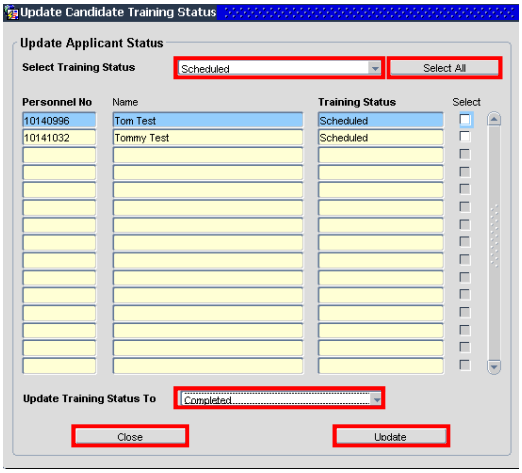


3) Select the training status of the candidates you wish to update by selecting from the **Select Training Status** drop down list. The candidates who have this training status display.

4) Click **Select All** or individually check the Select check box to select the candidates you wish to update.

5) Select the training status you wish to apply to the selected candidates by selecting from the **Update Training Status To** drop down list.

6) Click **Update**. The selected candidates training status is amended in the Candidates table in the Maintain Scheduled Courses screen.



7) Click **Close** to close the Update Candidate Training Status screen.

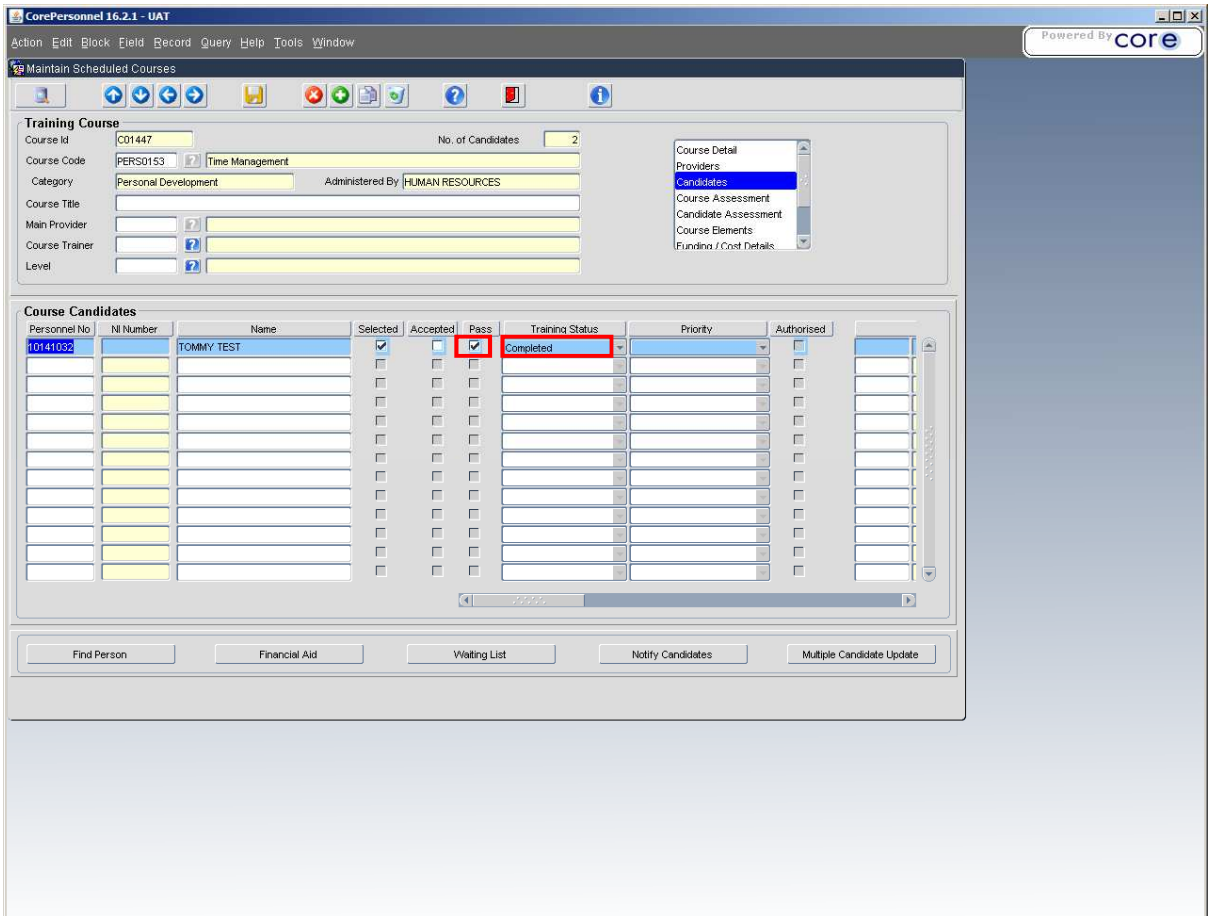
8) Click the **Exit** button on the toolbar to return to the main menu.

Courses Leading to Qualifications

Where completion of a course, or a course element, leads to the award of a qualification, a record of that qualification should be created against the employee's qualification history. An outline record will be automatically created in the employee's qualification history where the **Level** and **Qualification** drop down selection lists were populated on the Maintain Course Set-Up screen and where the **Pass** indicator is selected against the candidate record.

1) Updated the Candidate's **Training Status** to Completed.

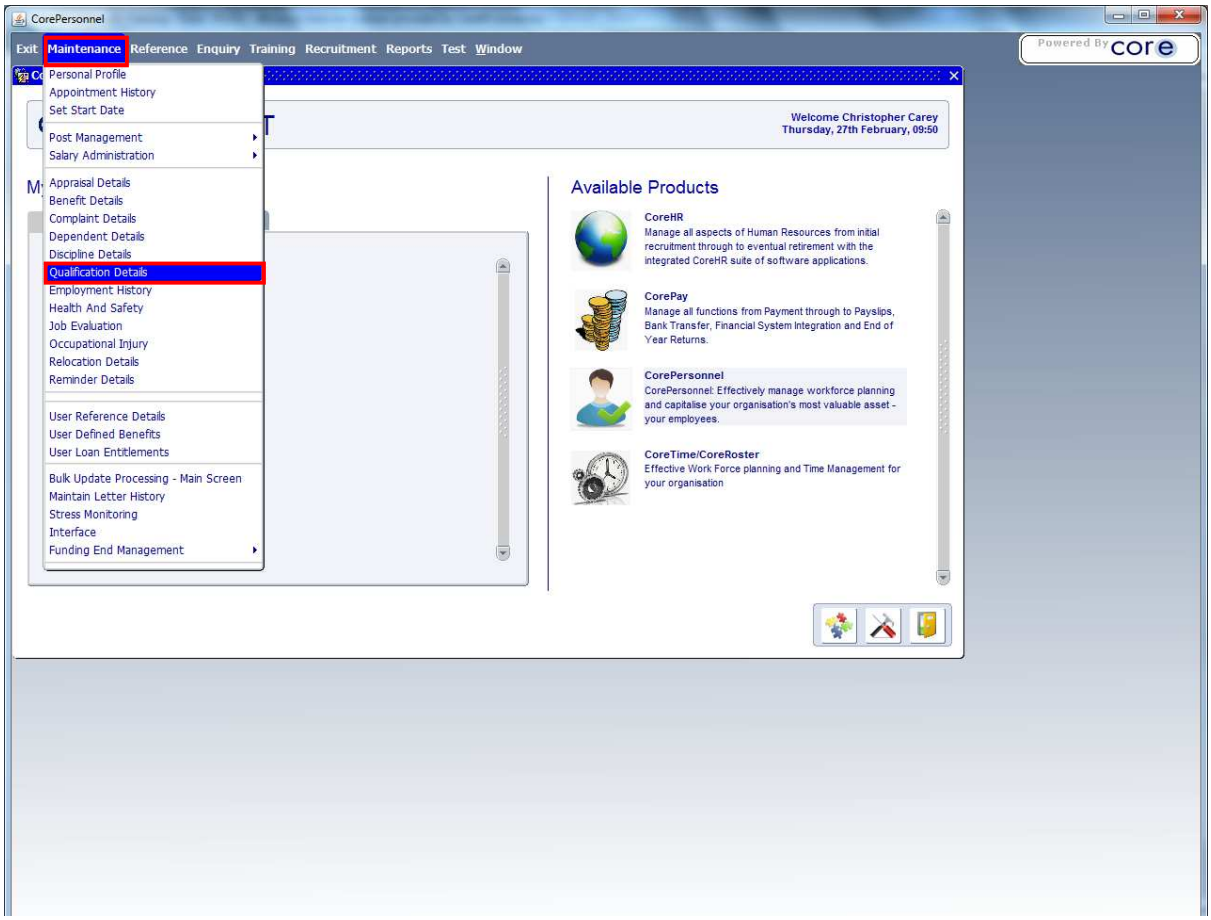
2) Check the Pass indicator checkbox.



Editing Qualification Details

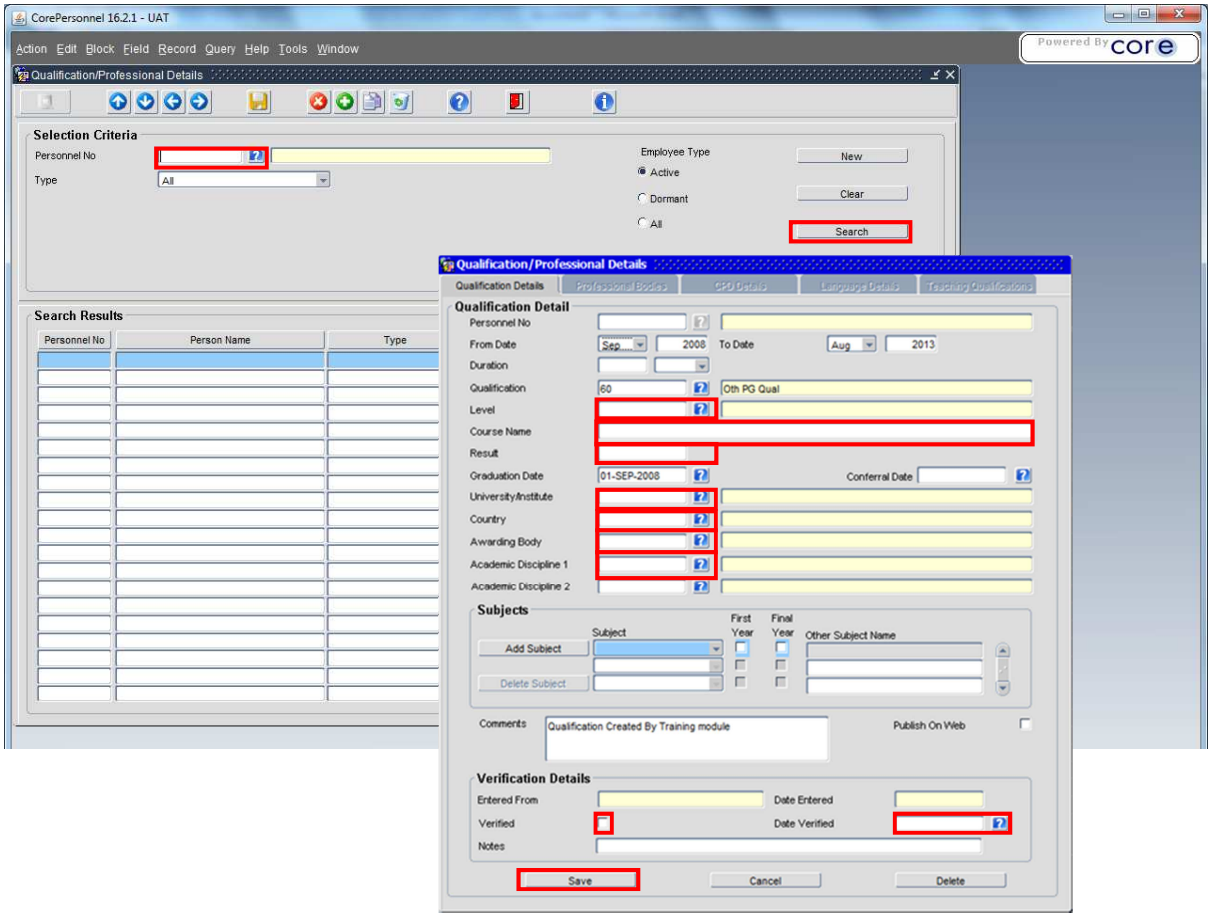
Where a course leads to the award of a qualification, checking the Pass indicator against the Candidates record will create a generic entry against the employee's qualification history. Specific details of the qualification need to be entered manually.

1) Select **Maintenance** → **Qualification Details**. The **Qualification/Professional Details** screen displays.



2) Click the question mark button to search for the employee you wish to edit qualification details for. A list of that member of staff's qualification details displays.

3) Select the qualification you wish to edit by double clicking on it. The edit **Qualification/Professional Details** screen displays. The Comments box states "Qualification Created By Training module".



4) Complete all relevant fields including:

   i. Level (e.g. OTHER POSTGRADUATE QUALIFICATION)

   ii. Course Name – This is the title of the qualification which may be different from the title of the training course. There is no need to include the type/ level of qualification (e.g. University Teaching and Learning)

   iii. Result (e.g. Pass)

   iv. University/Institute (e.g. CARDIFF UNIVERSITY)

   v. Country (e.g. UNITED KINGDOM)

   vi. Awarding Body (e.g. Cardiff University)

   vii. Academic Discipline 1 (e.g. Training Teachers – Higher Edu)

   viii. Verified

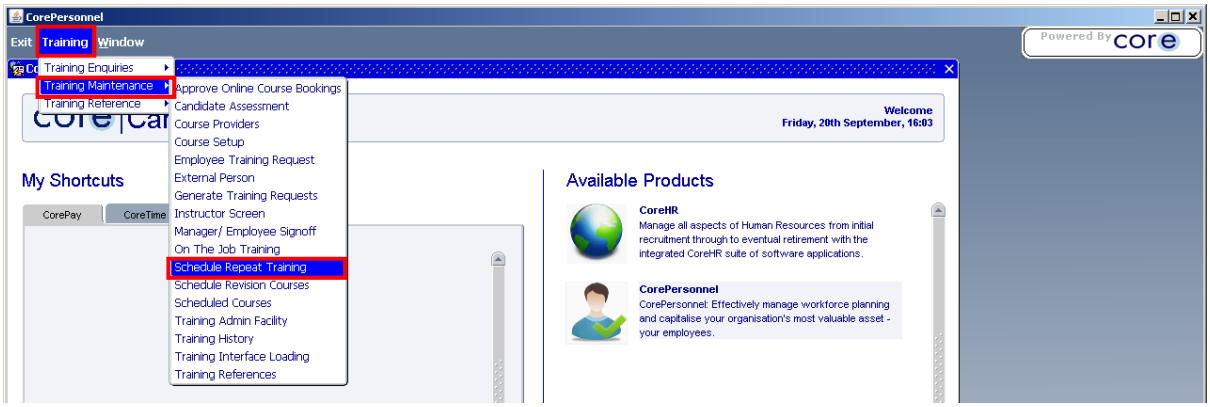
   ix. Date Verified

5) Click **Save**.

Schedule Repeat Training

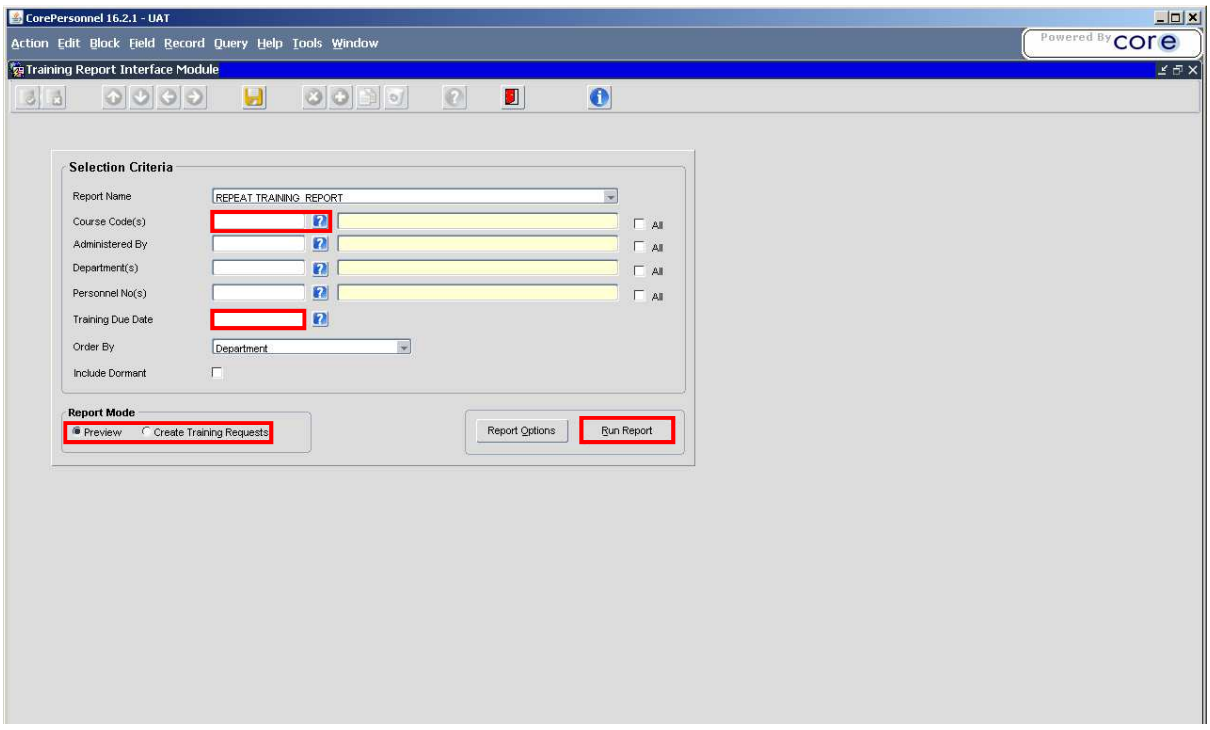
Schedule repeat training enables a training request to be created for all candidates who attended the same course at an earlier date. The periodicity of the repeat training is defined by the Repeat Interval on the Main Course Set-Up screen.

1) Select **Training → Training Maintenance → Schedule Repeat Training**. The **Training Report Interface Module** screen displays.



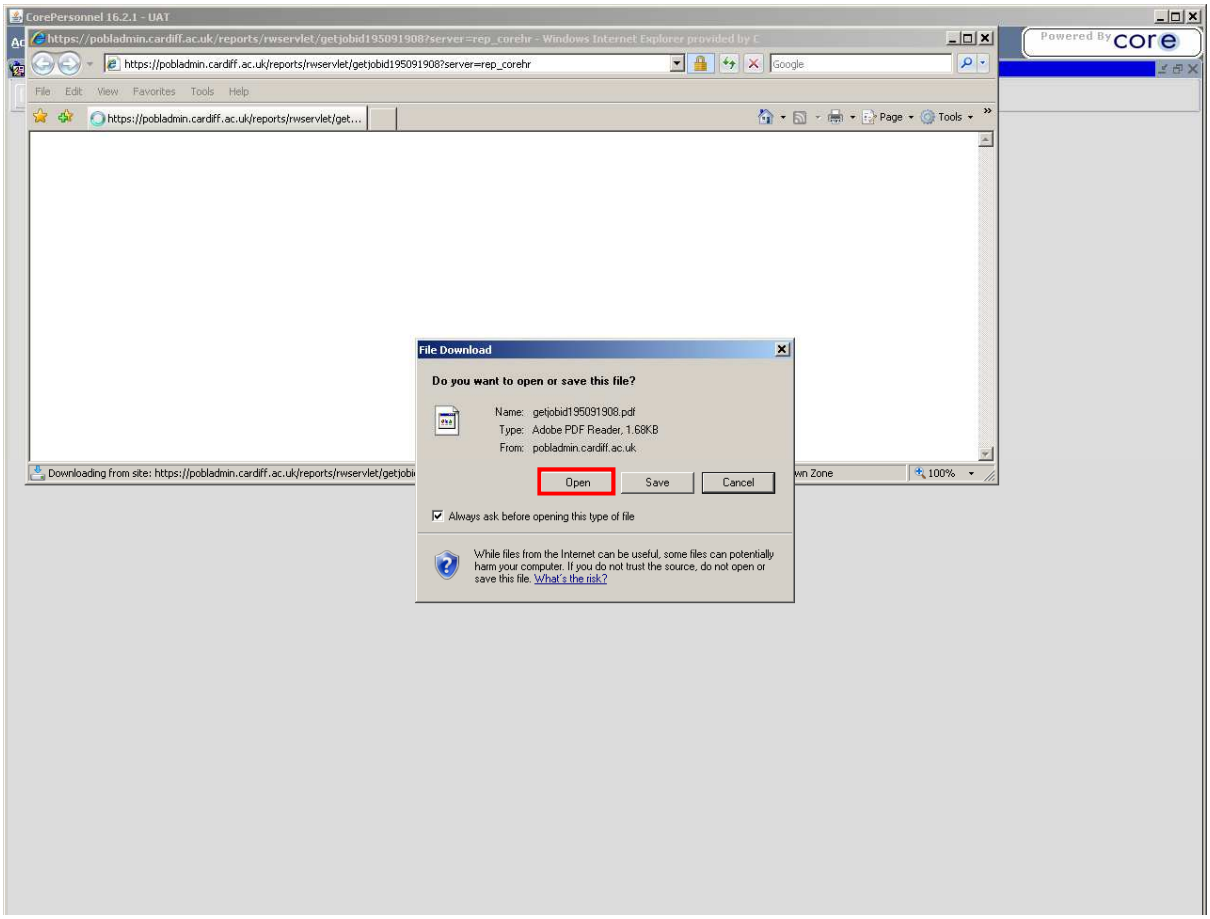
2) Define the Selection Criteria you wish to use to identify where repeat training is due/ overdue. **Training Due Date** is a mandatory field.

3) Set the Report Mode indicator to either **Preview** or **Create Training Requests** as appropriate. The Report Mode defaults to Preview which allows you to view a report of candidates who are due/ overdue repeat training without creating training requests. It is recommended that the Preview mode is always used to test the selection criteria before creating training requests.



4) Click **Run Report**. The report file is downloaded and you are prompted to open the report.

5) Click **Open**. The report displays. If the Report Mode was set to Create Training Requests, the training requests will also be created against each candidates training record.


CorePersonnel 16.2.1 - UAT
Powered By core
File Edit View Favorites Tools Help
Page Tools
Downloading from site: https://pobladmin.cardiff.ac.uk/reports/rwservlet/getjobi
100%
File Download
Do you want to open or save this file?
Name: getjobid195091908.pdf
Type: Adobe PDF Reader, 1.68KB
From: pobladmin.cardiff.ac.uk
Open
Save
Cancel
Always ask before opening this type of file
While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. What's the risk?

Skills/ Training Matrix

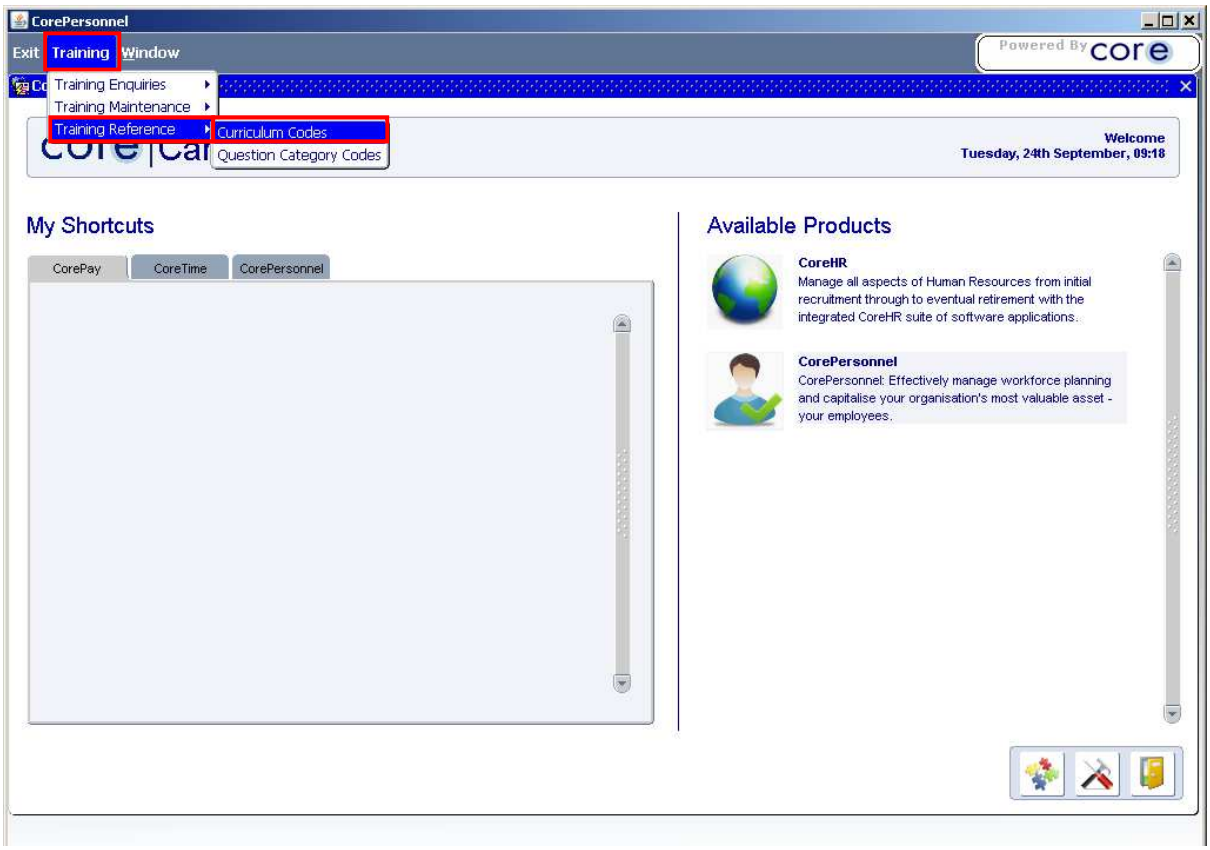
Skills/ Training Matrix

Once a training matrix is created, training requests are automatically generated for new employees or for employees who are transferring internally and where their details match the matrix rules. Training requests will not be created for existing employees where there is no change in role.

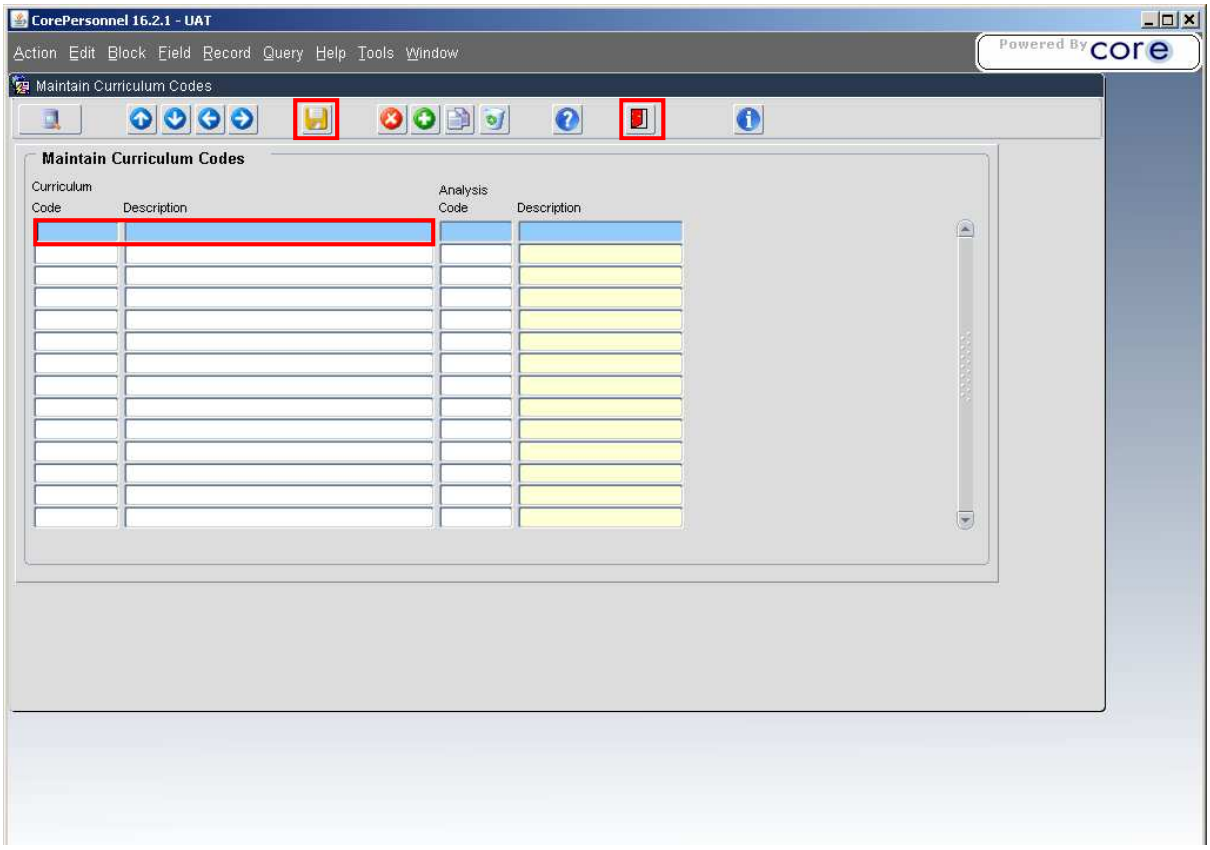
Set up a Curriculum/ Role

Skill sets for particular roles or teams can be grouped under a curriculum. This is not a mandatory step in the creation of a Skills/ Training matrix.

1) Select **Training** → **Training Reference** → **Curriculum Codes**. The **Maintain Curriculum Codes** screen displays.



2) Click the 1st blank row in the Maintain Curriculum Codes table such that the row is highlighted blue.



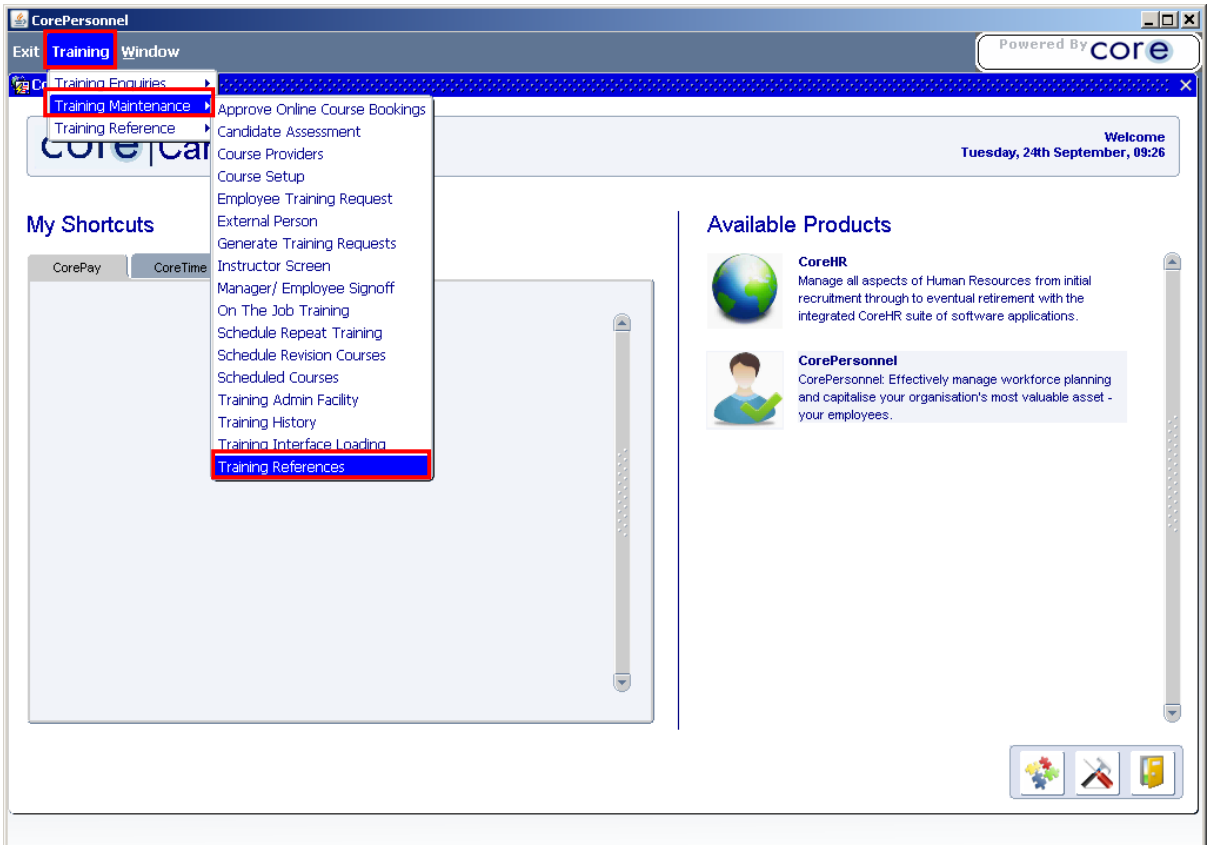
3) Enter relevant curriculum details.

4) Click **Save** .

5) Click the **Exit** button to return to the main menu.

Set Up a Training Matrix

1) Select **Training** → **Training Maintenance** → **Training References**. The **Maintain Training References** screen displays.



2) Click **Search**. All training matrixes previously created display in the Training References table. Ensure that the training matrix you intend to create has not been created previously before continuing to the next step.

3) Click the **Insert** button on the toolbar at the top of the screen. A new row becomes available in the Training References table.

4) Select a criterion from the **Training Reference 1** drop down list (e.g. Department).

5) Tab to the next field and click the valid values button in the main toolbar to display a list of values linked to the criterion selected in step 4 above.

6) If necessary, select a second criterion from the **Training Reference 2** drop down list. Tab to the next field a click the valid values button in the main toolbar to display a list of values linked to the criterion selected.

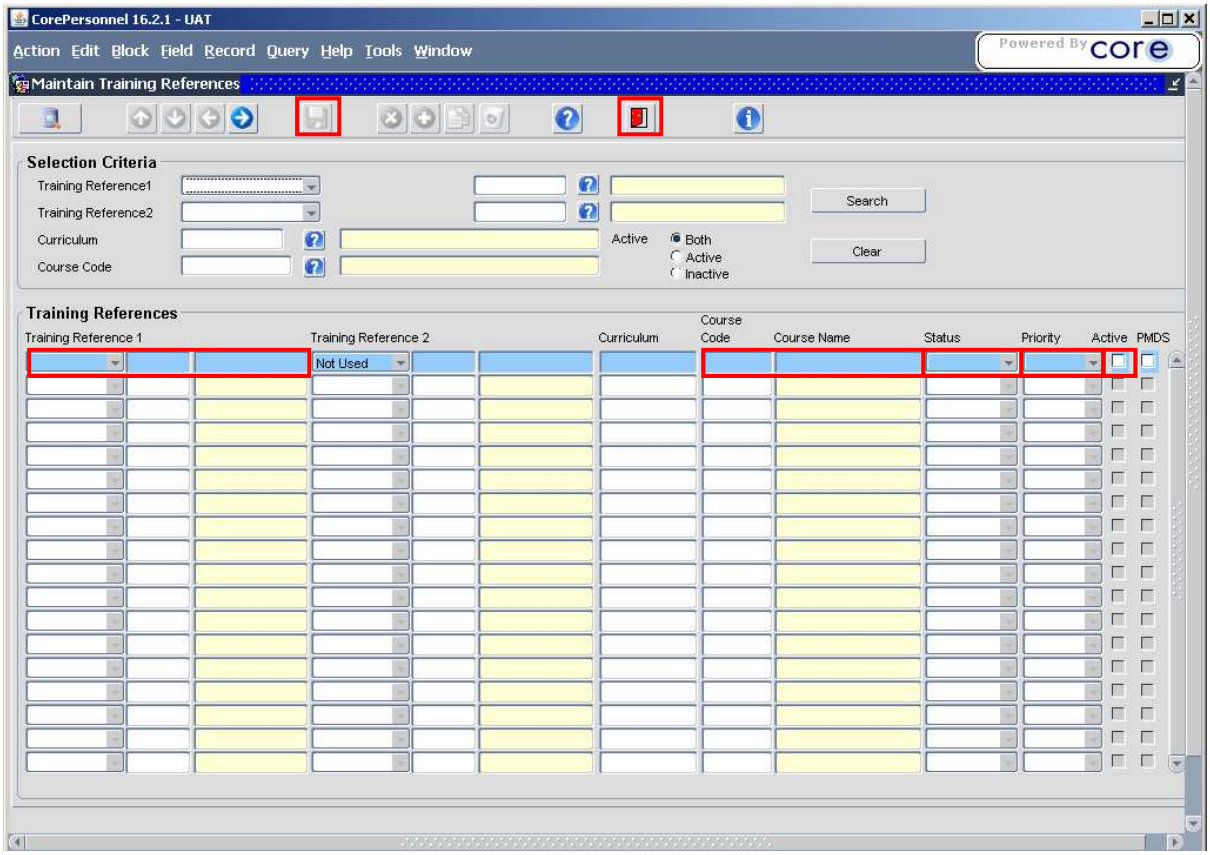
7) Tab to the **Course Code** field and click the valid values button in the main toolbar to select from a list of courses.

8) Tab to the **Priority** field and select a priority. It is recommended that Medium be used as a default priority.

9) Check the **Active** indicator check box.

10) Click **Save** .

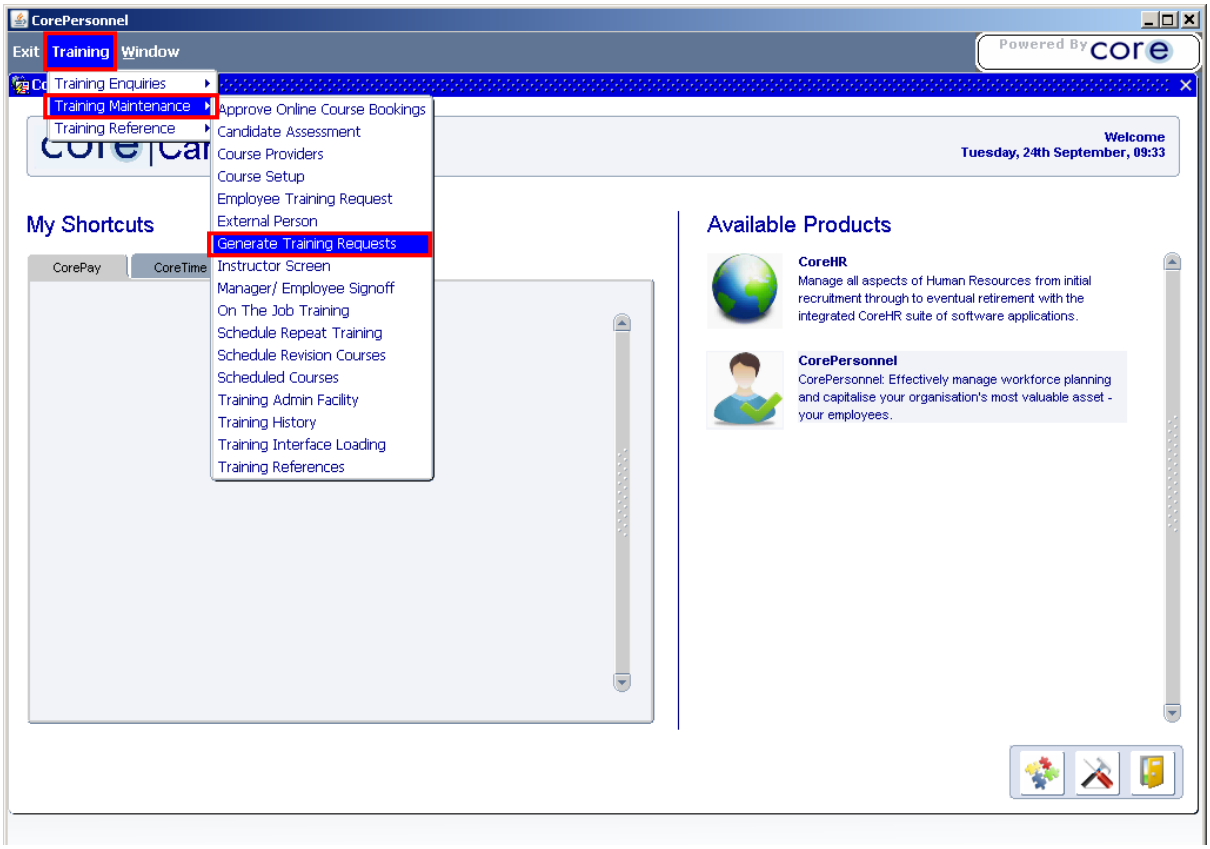
11) Click the **Exit** button on the toolbar to return to the main menu.



Run Training Request Generation Report

Training requests are generated automatically for new employees and employees who have changed roles when they have a matching training matrix. Training requests for current employees can be created using the Training Request Generation Report.

1) Select **Training** → **Training Maintenance** → **Generate Training Reports**. The **Generate Training Requests** screen displays.



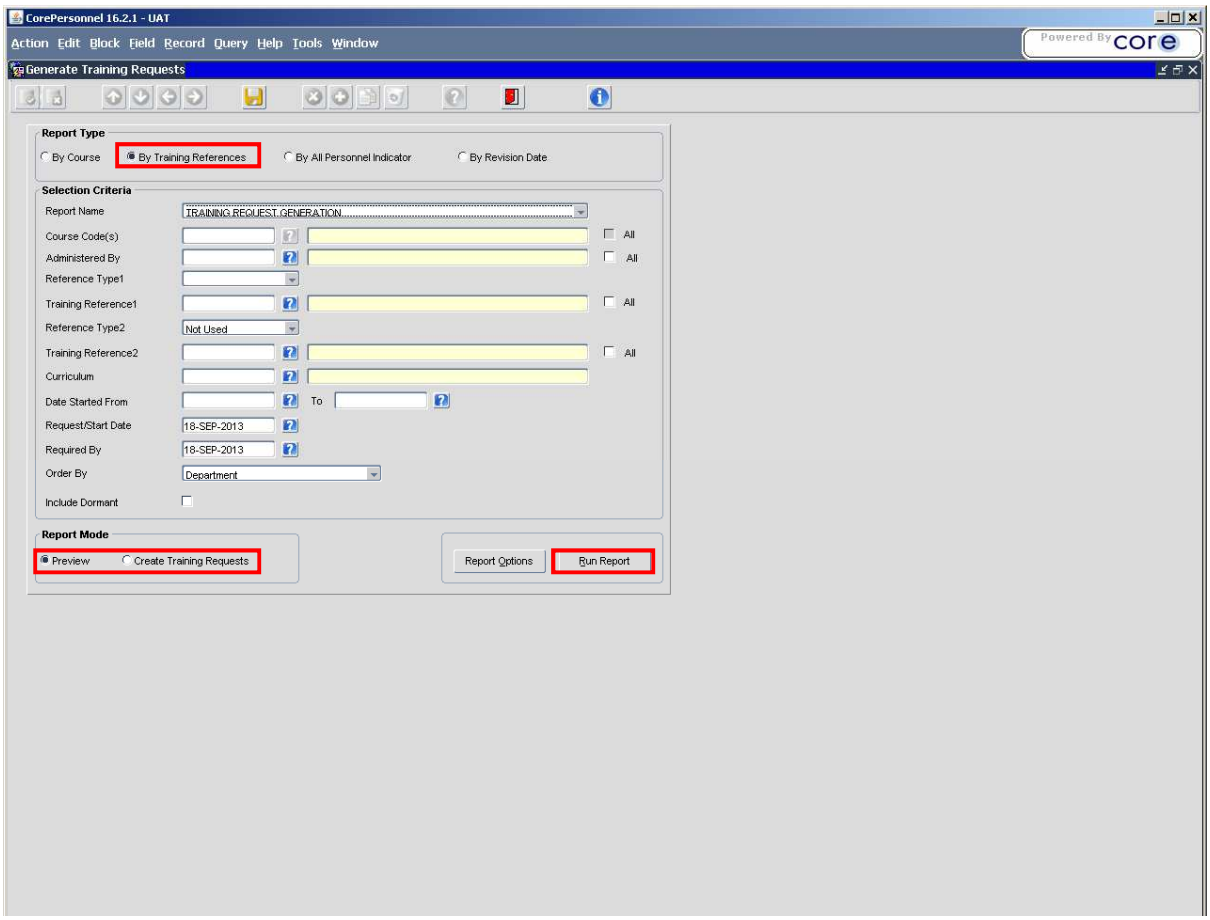
The following report types are available:

i.	By Course	Allows the user to search for all rules created within the Training References screen for a particular course.
ii.	By Training Reference	Allows the user to search for all rules within the Training References screen for particular reference types (e.g. Department).
iii.	By All Personnel Indicator	The All Personnel Indicator can be selected in the Maintain Course Set-up screen.
iv.	By Revision Date	Allows the user to search by revision dates on courses.

2) Click on the **By Training Reference** radio button in the Report Type box.

3) Define your selection criteria. Fields where the valid values button is highlighted blue are available to select from.

4) Set the Report Mode indicator to either **Preview** or **Create Training Requests** as appropriate. The Report Mode defaults to Preview which allows you to view a report of candidates who meet your selection criteria without creating training requests. It is recommended that the Preview mode is always used to test the selection criteria before creating training requests.



5) Click **Run Report**. The report file is downloaded and you are prompted to open the report.

6) Click **Open**. The report displays. If the Report Mode was set to Create Training Requests, the training requests will also be created against each candidates training record.

7) Click the **Exit** button on the toolbar to return to the main menu.

Training Enquiries

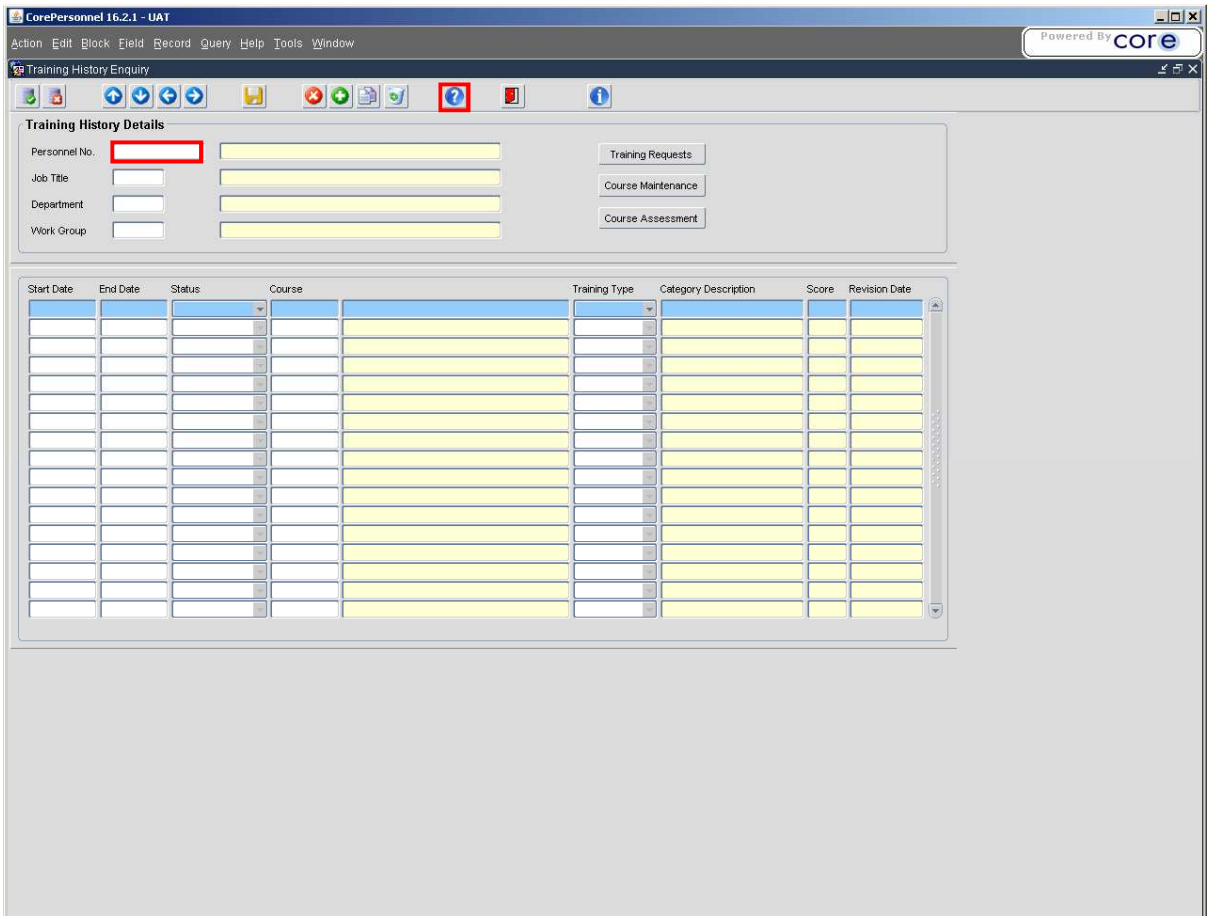
Training Enquiries

The Training Enquiries menu gives the user the option to view training details. Typically data cannot be modified on these screens.

Employee Training History

1) Select **Training** → **Training Enquiries** → **Training History**. The **Training History Details** screen displays.

2) Click the valid values button to display a list of employees.



3) Select the employee from the list for whom you wish to view their training history and click **OK**. The list of employees closes and the selected employee's training history displays in the **Training History Details** screen.

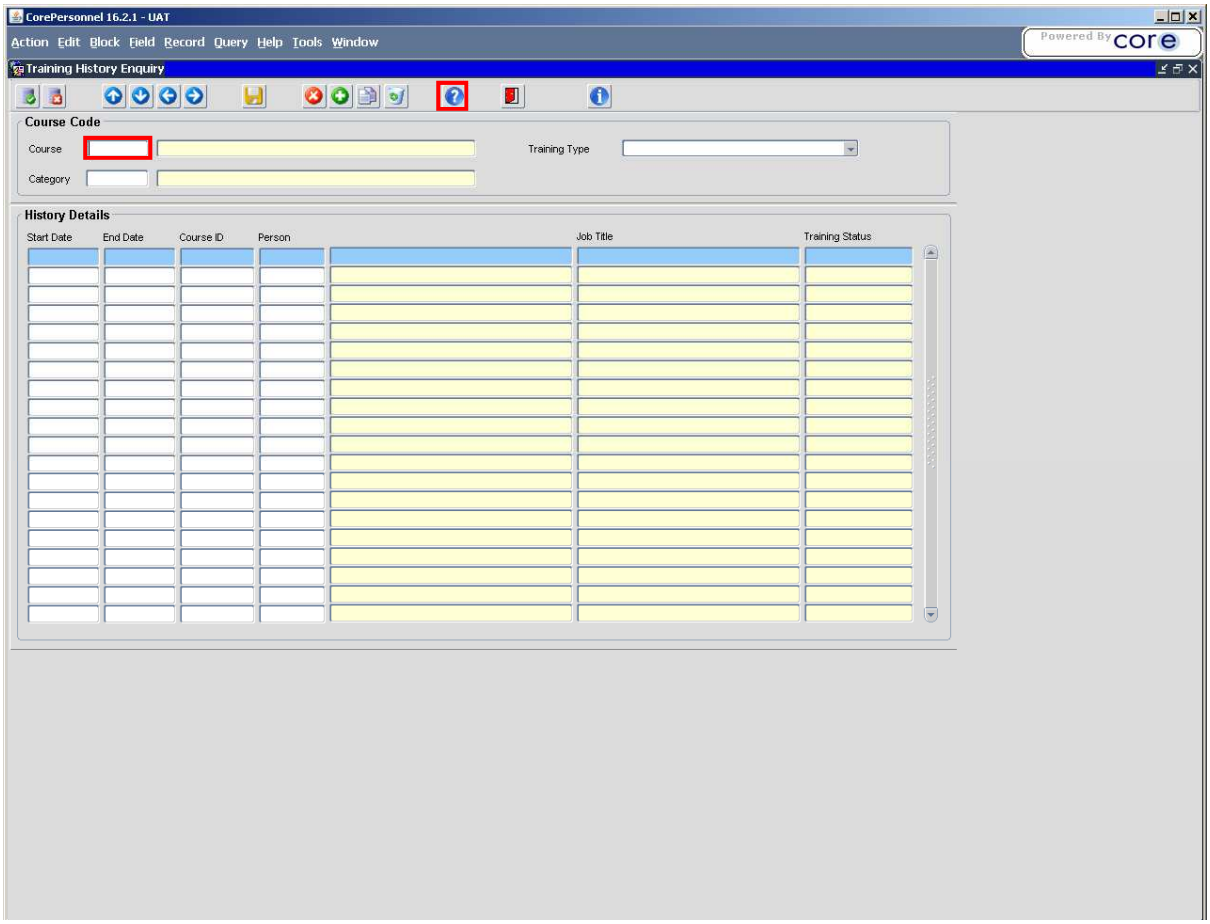
The **Training Request** button is a direct link to the Maintain Employee Training Request screen where you can create a new training need for the selected employee. The **Course Maintenance** button links to the Maintain Scheduled Course screen where you can amend details of the events which comprise the employee's training history. The **Course Assessment** button links to the Maintain Course Assessment screen where you can complete evaluation questionnaires on behalf of the employee.

4) Click the **Exit** button on the toolbar to return to the main menu.

Training History by Course

1) Select **Training** → **Training Enquiries** → **Training History By Course**. The **Training History Enquiry** screen displays.

2) Click the valid values button to display a list of courses.



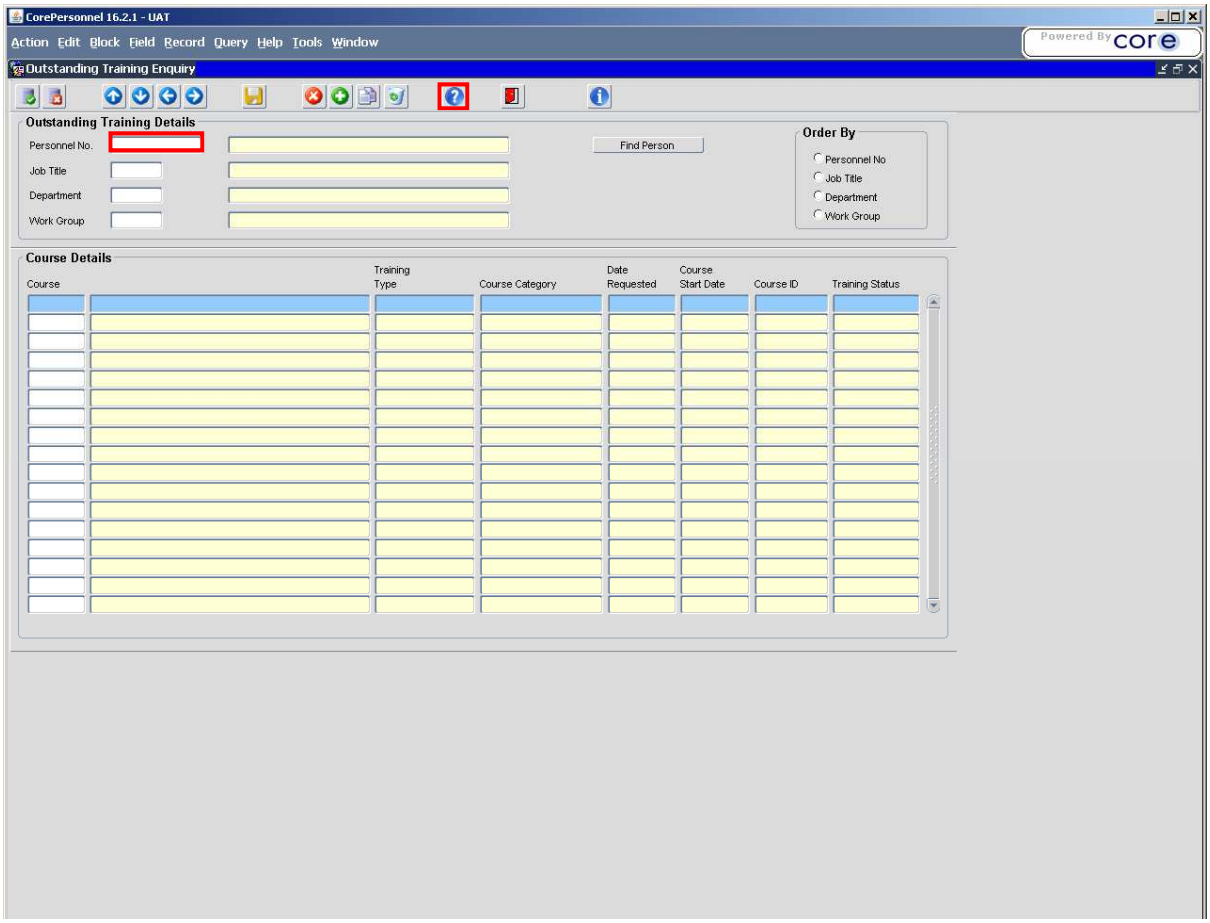
3) Select the course from the list for which you wish to view the training history and click **OK**. Details of all candidates who have a history associated with that course are displayed in the **History Details** table.

4) Click the **Exit** button on the toolbar to return to the main menu.

Outstanding Training by Employee

1) Select **Training** → **Training Enquiries** → **Outstanding Training**. The **Outstanding Training Details** screen displays.

2) Click the valid values button to display a list of employees.



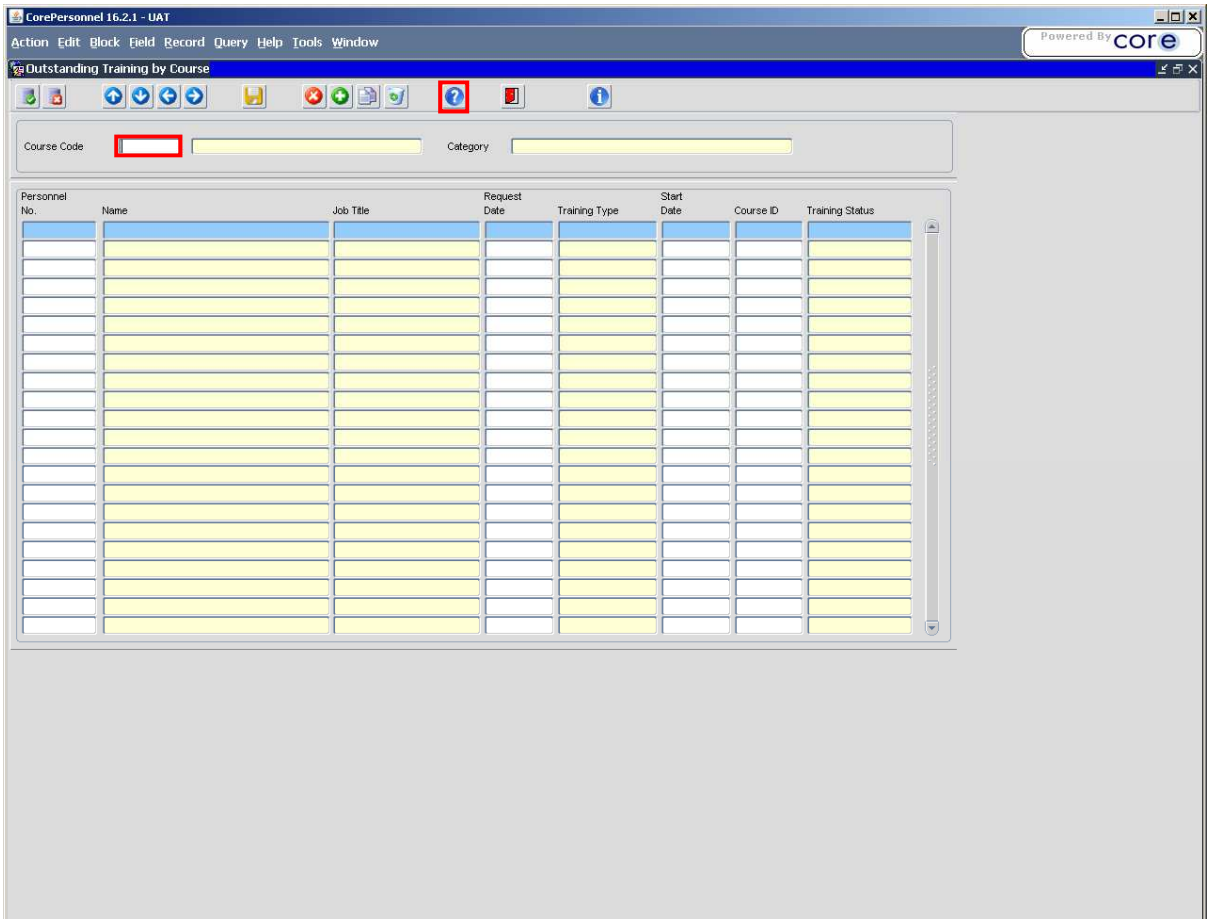
3) Select the employee from the list for whom you wish to view their outstanding training and click **OK**. The list of employees closes and the selected employee's outstanding training displays in the **Course Details** table.

4) Click the **Exit** button on the toolbar to return to the main menu.

Outstanding Training by Course

1) Select **Training** → **Training Enquiries** → **Outstanding Training By Course**. The **Outstanding Training Details** screen displays.

2) Click the valid values button to display a list of courses.



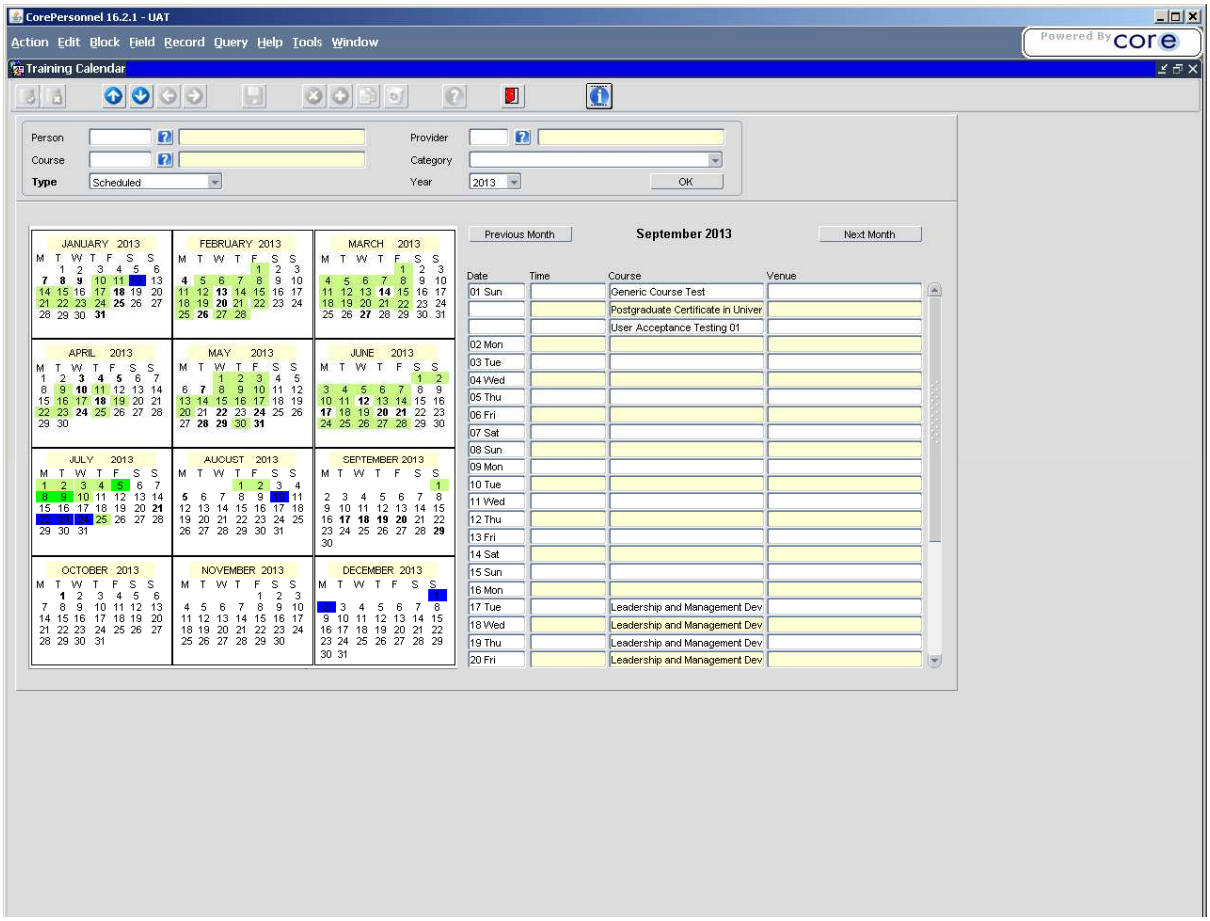
3) Select the course from the list for which you wish to view outstanding training and click **OK**. The list of courses closes and the outstanding training for the selected courses displays in the **Outstanding Training by Course** screen.

4) Click the **Exit** button on the toolbar to return to the main menu.

Training Calendar

1) Select **Training** → **Training Enquiries** → **Training Calendar**. The **Training Calendar** screen displays.

The Training Calendar can be viewed by: Person; Course; Type; Provider; Category; Year.

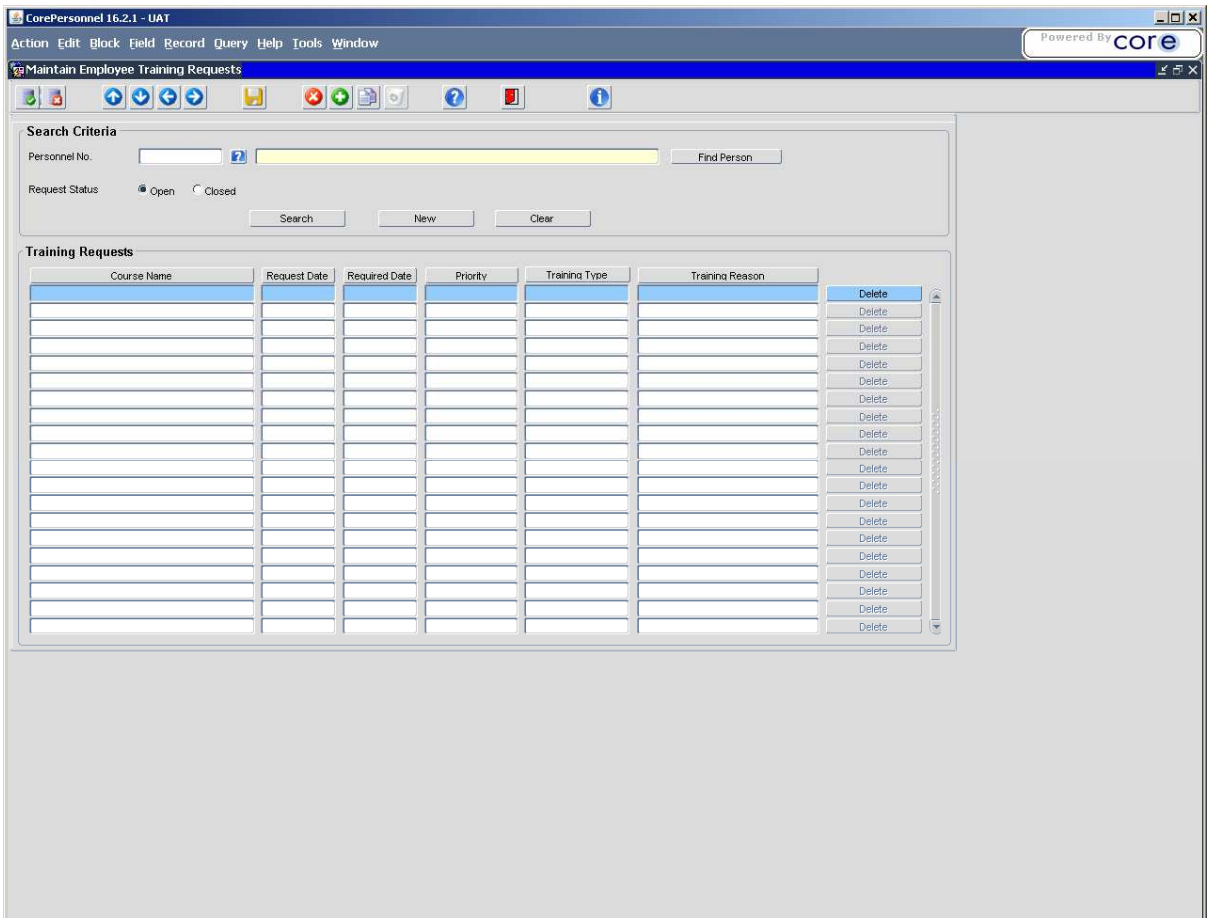


2) Click the **Exit** button on the toolbar to return to the main menu.

Training Requests

1) Select **Training** → **Training Enquiries** → **Training Requests**. The **Maintain Employee Training Requests** screen displays.

2) Select the candidates you wish to view training requests for by clicking the valid values button to display a list of candidates. Details of the selected candidates training requests display in the **Training Requests** table.

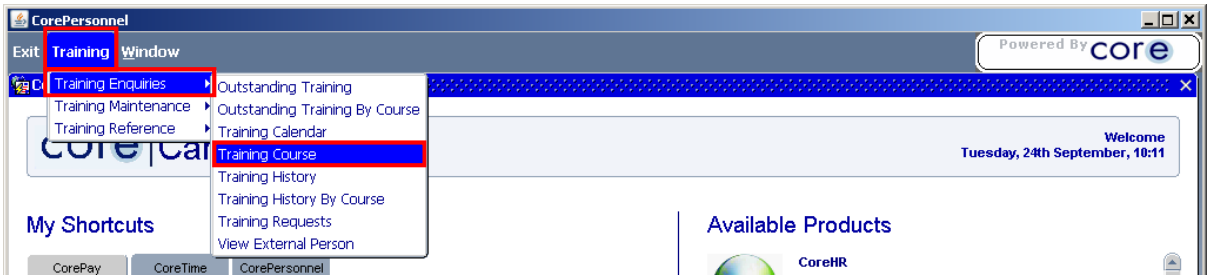


New requests can be created or an existing request deleted from this screen.

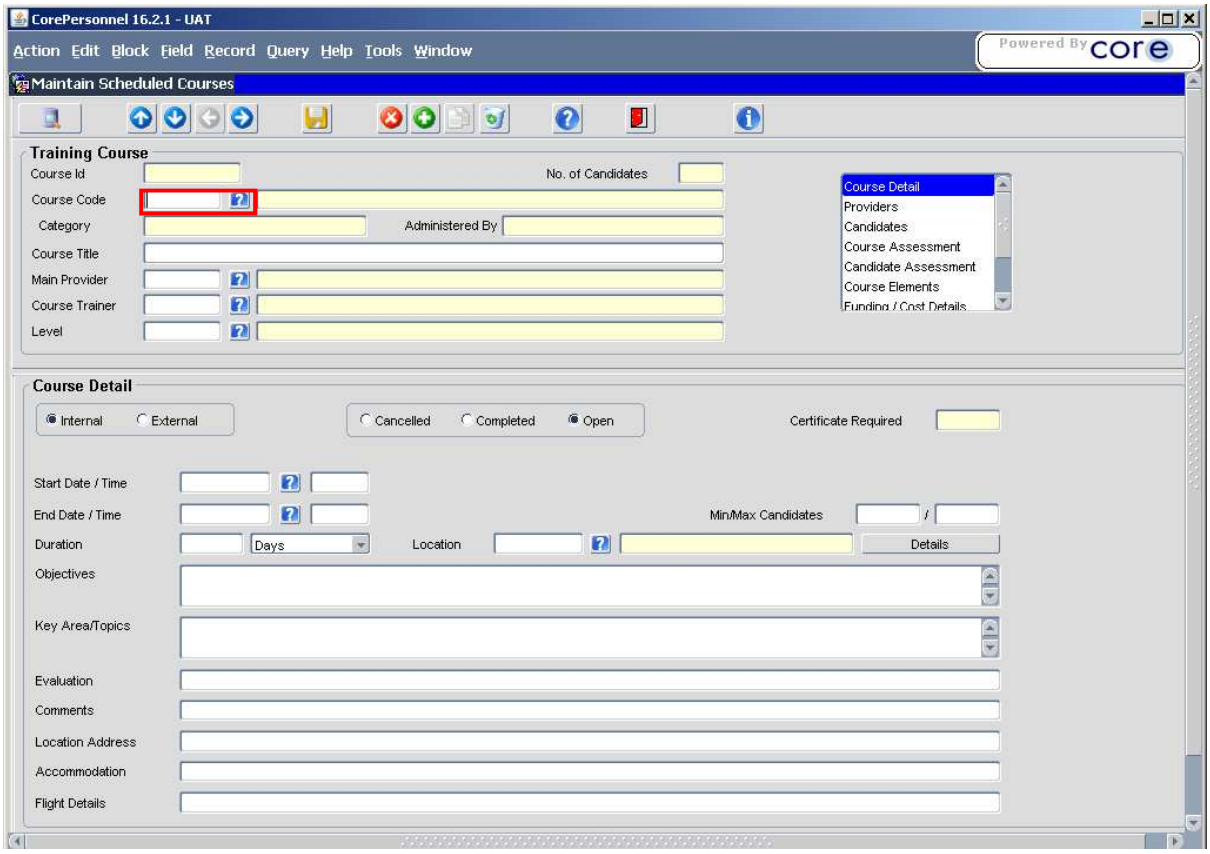
3) Click the **Exit** button on the toolbar to return to the main menu.

Training Course

1) Select **Training** → **Training Enquiries** → **Training Course**. The **Maintain Scheduled Courses** screen displays.



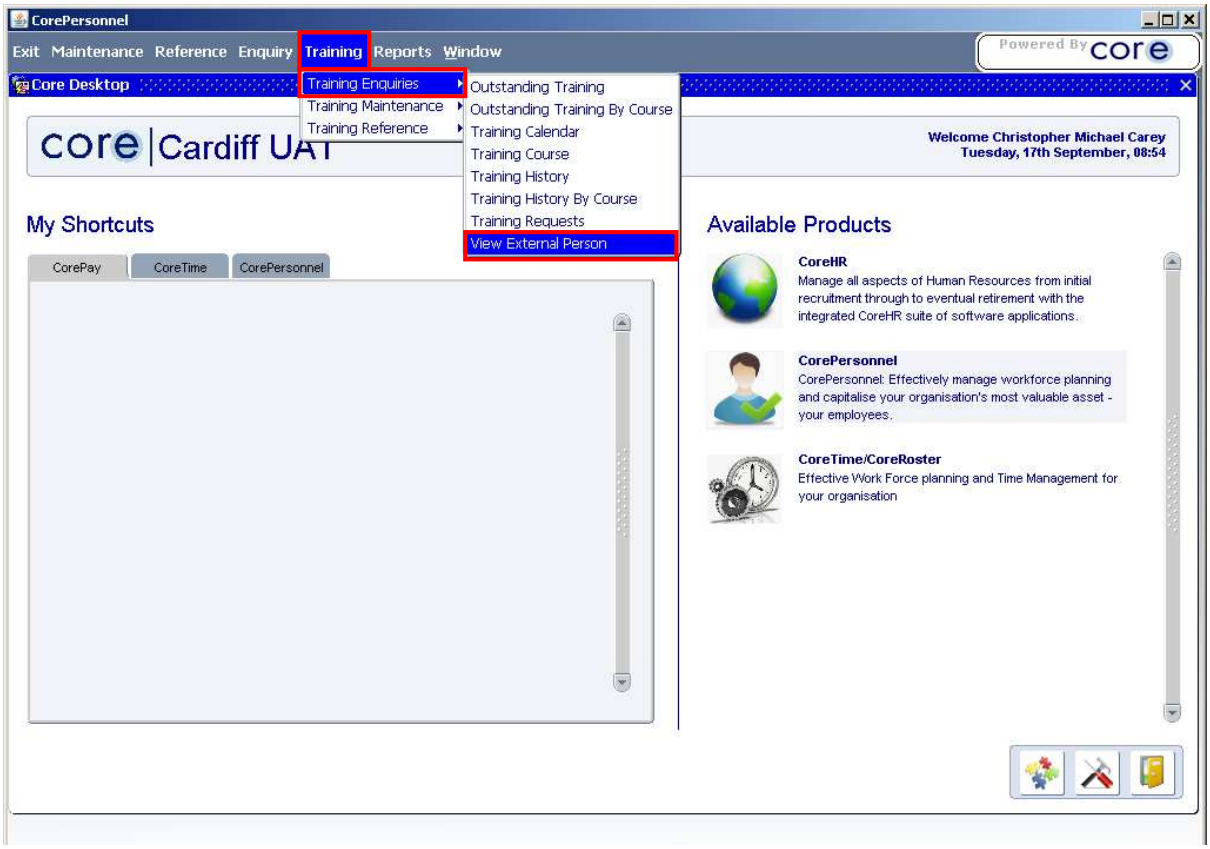
2) Select the course you wish to view details for by clicking the valid values button to display a list of courses.



3) Click the **Exit** button on the toolbar to return to the main menu.

View External Person

1) Select **Training** → **Training Enquiries** → **View External Person**. The **View External Person** screen displays.



2) Select the external person you wish to view details for by clicking the valid values button to display a list of candidates.

3) Click the **Exit** button on the toolbar to return to the main menu.

On the Job Courses

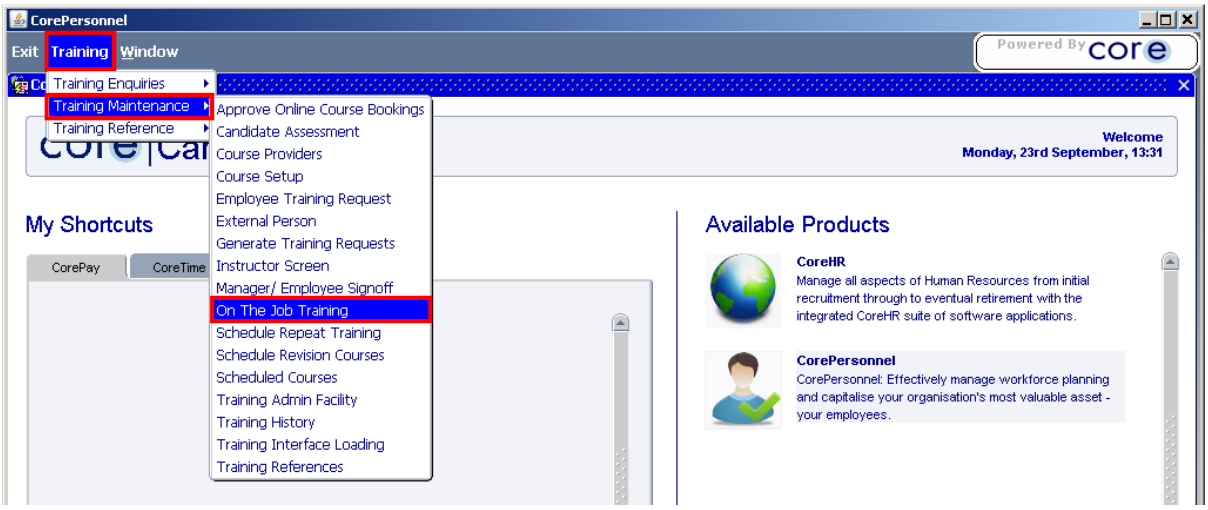
On the Job Courses

On the Job training typically refers to training delivered in the work/ job context and tailored to the trainee's needs rather than the more general classroom based learning environment (e.g training to become competent in a particular technique). The range of details that can be recorded include: the subject covered (i.e. skills and abilities related to a job); number of hours spent on training by the trainee; number of hours spent on training by the trainer; method of training evaluation; results of training evaluation.

The set-up and maintenance of On the Job courses is the same as that for scheduled courses and so these aspects of administering an On the Job course will not be duplicated here.

Recording On the Job Training Course Details

1) Select **Training → Training Maintenance → On The Job Training**. The **Maintain On The Job Training** screen displays. Employees with requests for On the Job courses and employees currently undergoing training display.

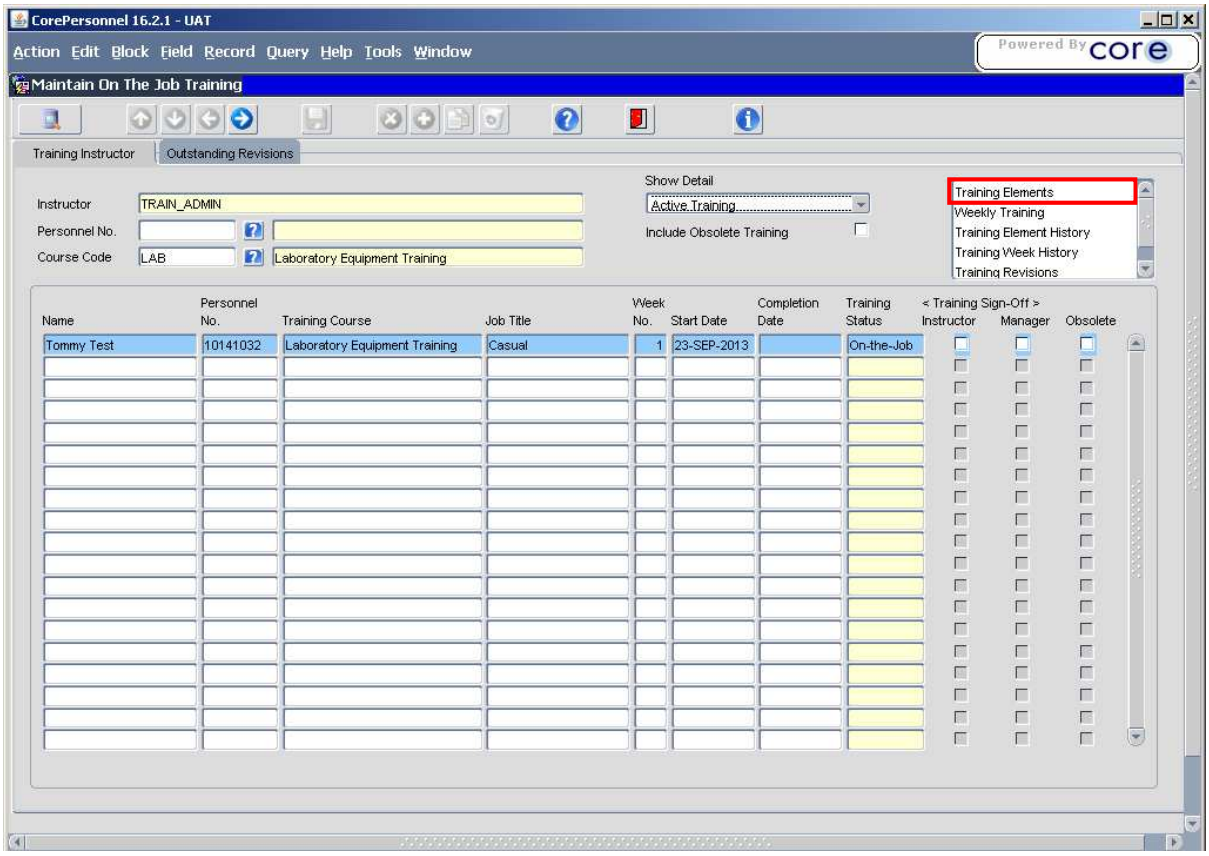


Training Elements

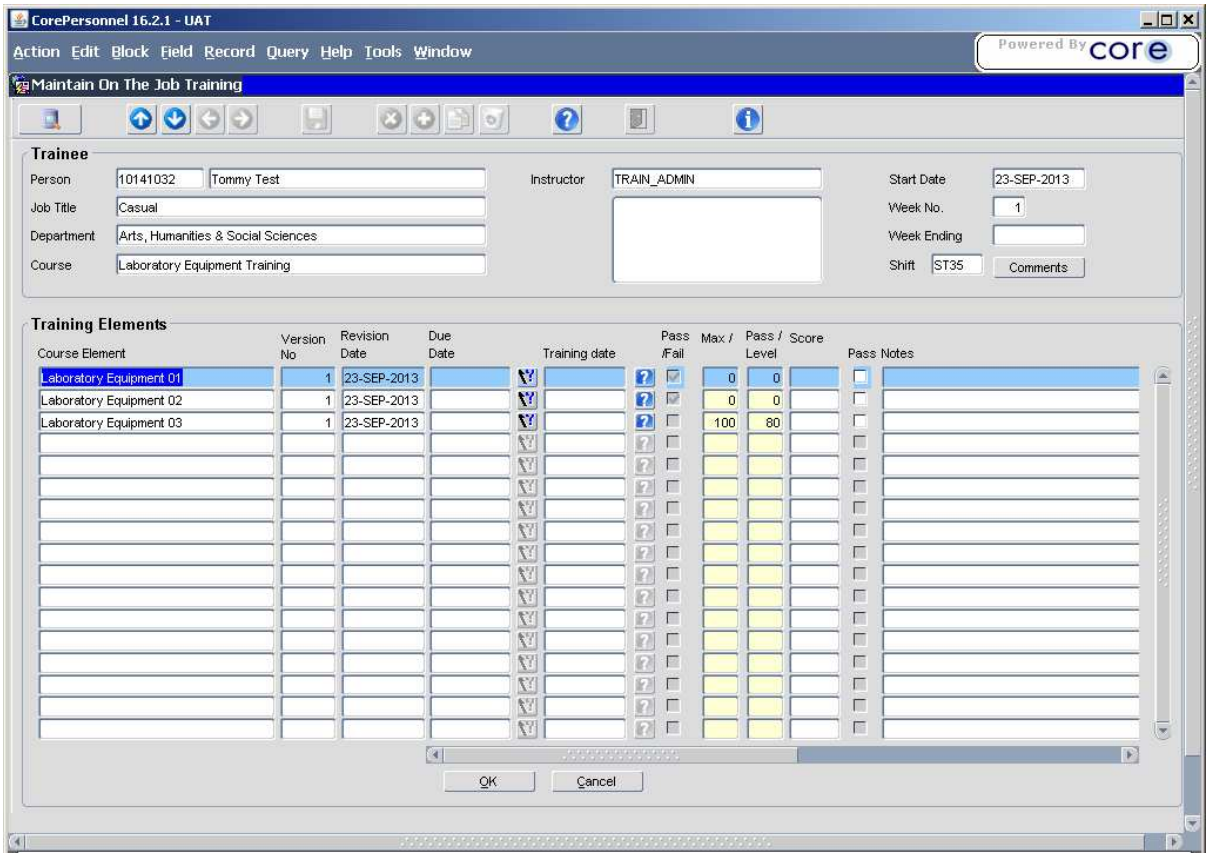
Training Elements are set up against a course. An employee will undertake these elements, depending on the On the Job course selected. The element set up in Training, Training Maintenance, Course Setup determines items such as the pass rate required for the elements, whether results are required, etc.

1) Click on the employee you wish to record training element details for such that the employee's record is highlighted blue.

2) Select **Training Elements** from the Select Detail menu on the Maintain On The Job Training screen. The **Training Elements** table displays.



3) Complete all relevant fields within the Training Elements screen as required. This may include: Training Date, Score, Pass indicator, and Notes. Where an element requires a score, the pass indicator will be automatically selected where the score exceeds the Pass Level.



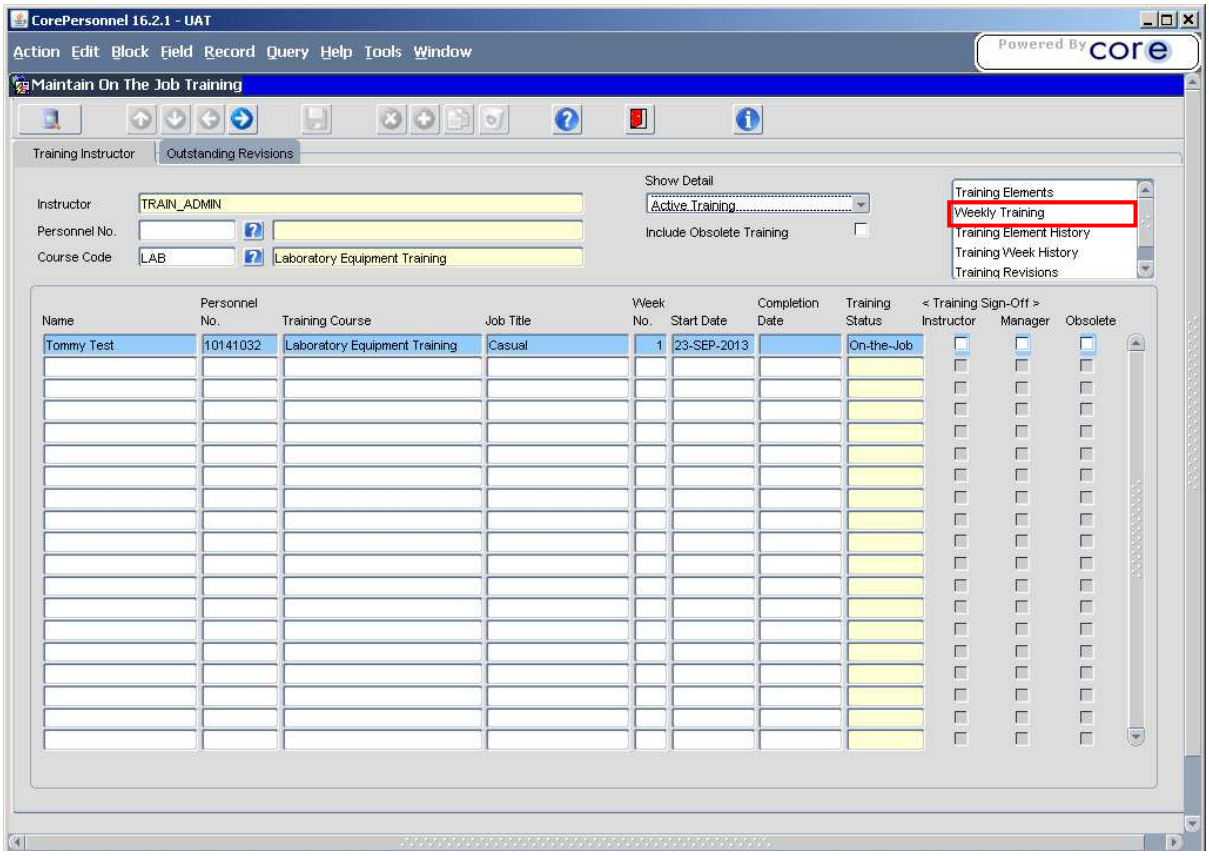
4) Click **OK**. The Training Elements table closes.

5) Click the **Exit** button on the toolbar to return to the main menu.

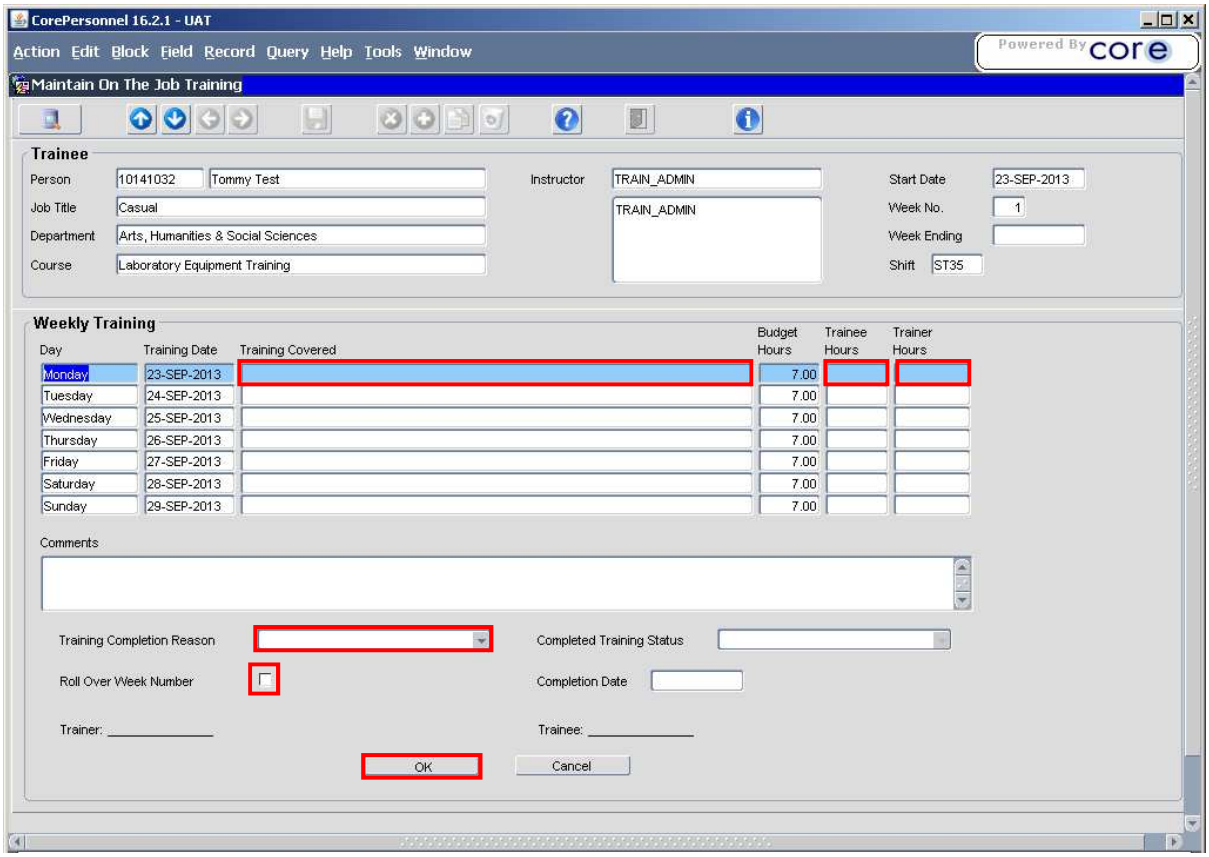
Weekly Training

1) Click on the employee you wish to record weekly training details for such that the employee's record is highlighted blue.

2) Select **Weekly Training** from the Select Detail menu on the Maintain On The Job Training screen. The **Weekly Training** table displays.



3) Complete all relevant fields within the Weekly Training table as required. Complete the **Training Covered**, **Trainee Hours** and **Trainer Hours** fields in the Weekly Training table.



4) When all the details have been entered for a particular week, check the **Roll Over Week Number** checkbox.

5) A **Training Completion Reason** can be selected from the drop down list.

6) Click **OK** to accept details. The Weekly Training table closes.

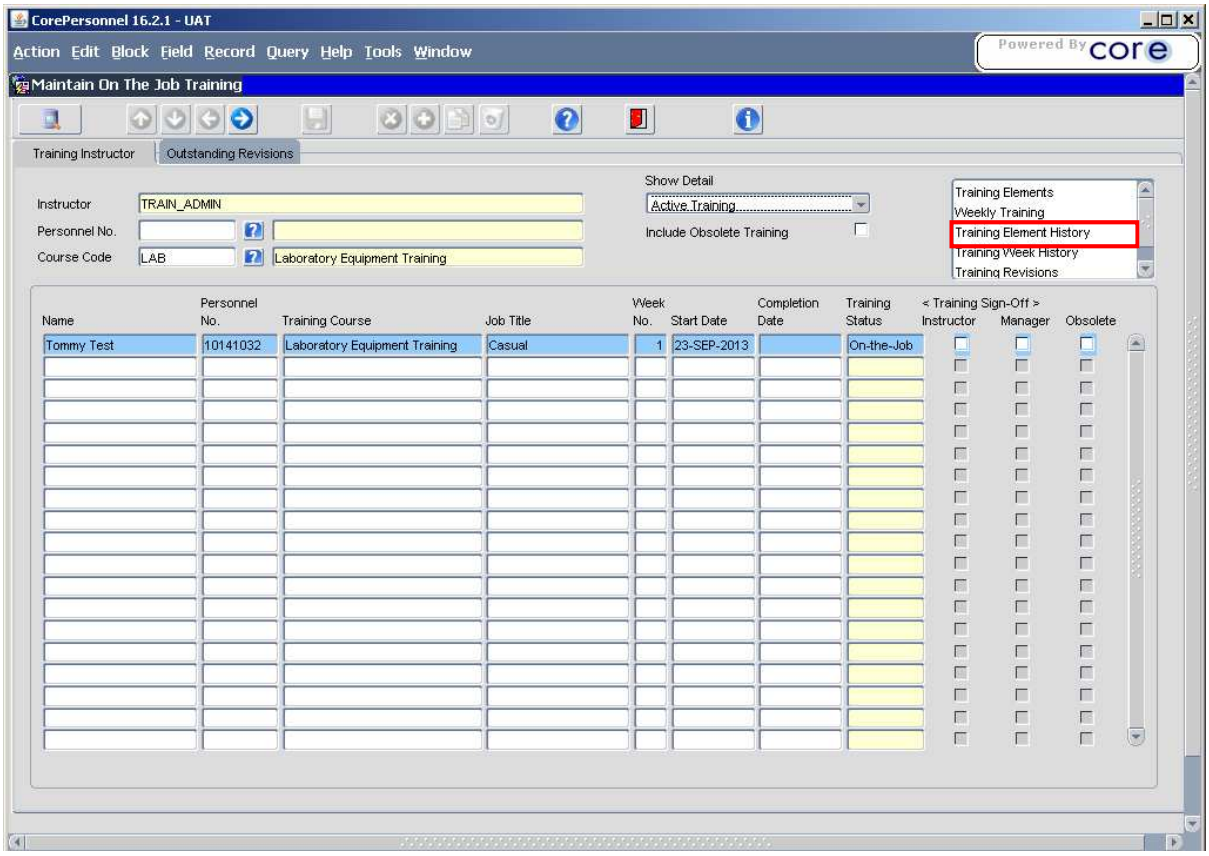
7) Click the **Exit** button on the toolbar to return to the main menu.

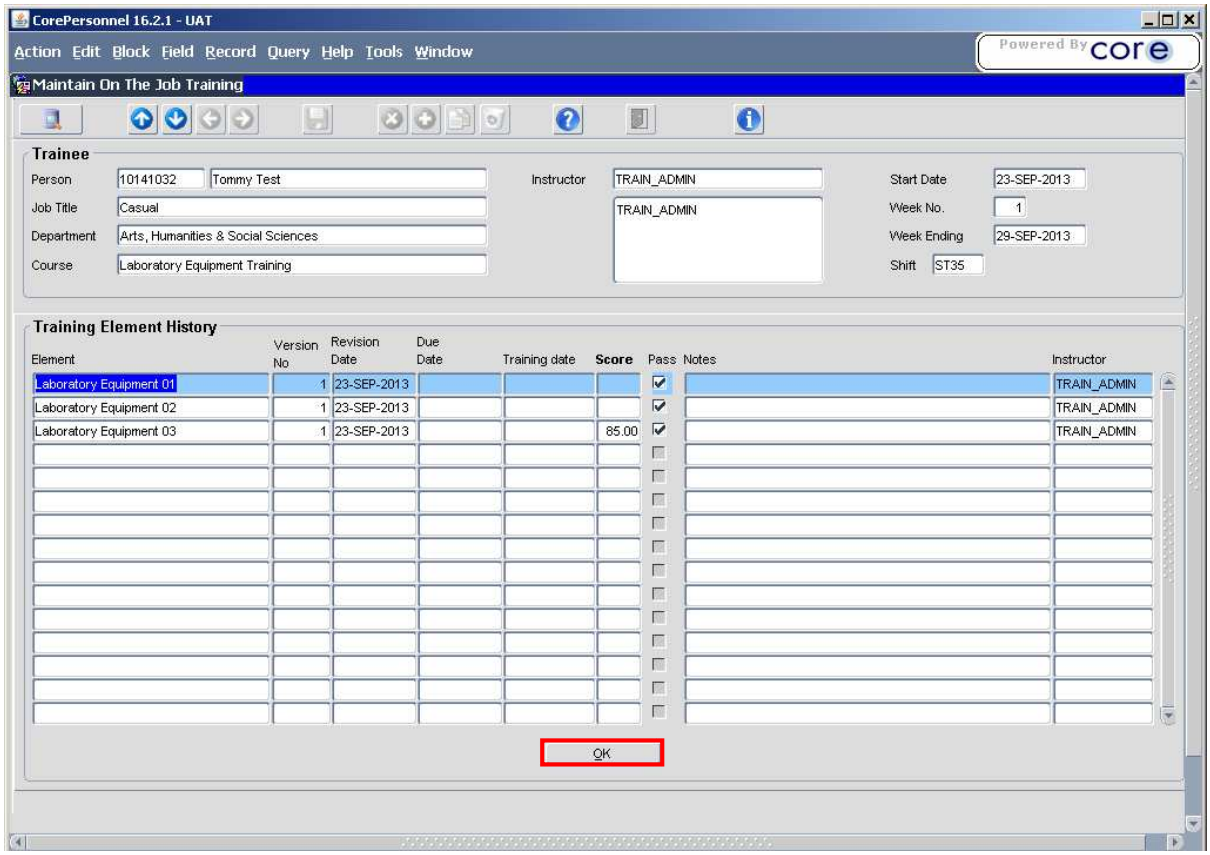
Training Element History

Where part of the course evaluation needs to be repeated, evaluation details can be entered again by selecting Training Elements. Simply enter the new training details by overwriting the current training date and evaluation results. A history is kept of all changes made and can be viewed in the Training Element History screen. The screen is read only.

1) Click on the employee you wish to view training element history details for such that the employee's record is highlighted blue.

2) Select **Training Element History** from the Select Detail menu on the Maintain On The Job Training screen. The **Training Element History** table displays.





3) Click **OK**. The Training Element History table closes.

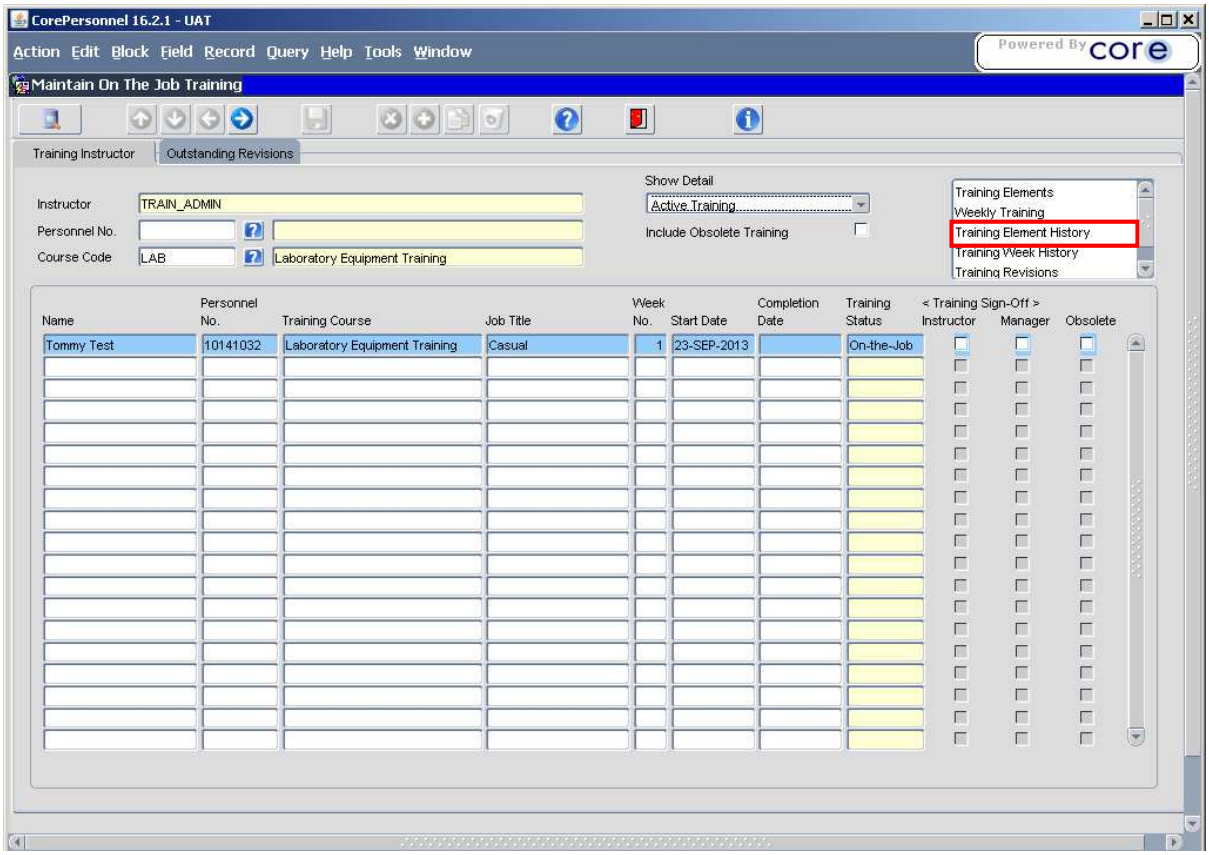
4) Click the **Exit** button on the toolbar to return to the main menu.

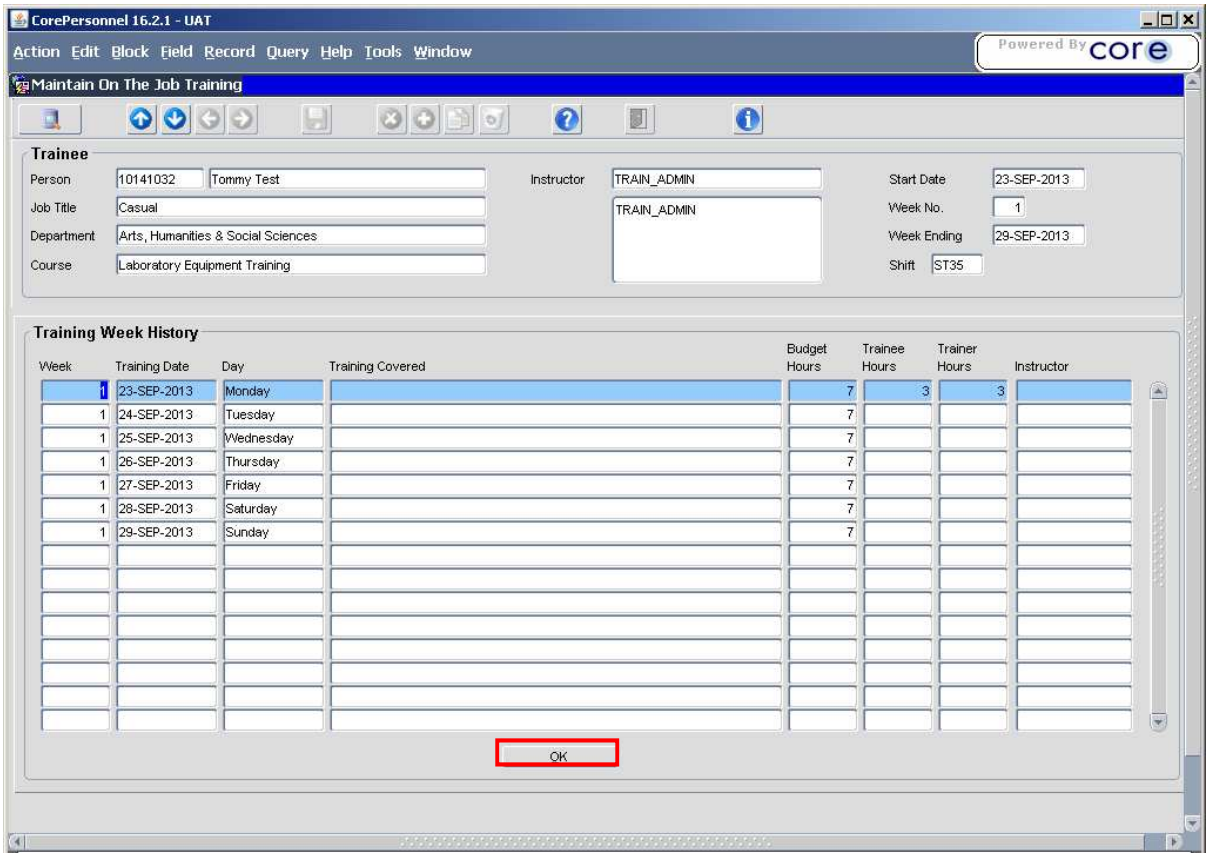
Training Week History

Training Week History displays a history of the subjects covered and hours spent for each training day. The screen is read only.

1) Click on the employee you wish to view training week history details for such that the employee's record is highlighted blue.

2) Select **Training Week History** from the Select Detail menu on the Maintain On The Job Training screen. The **Training Week History** table displays.





3) Click **OK**. The Training Week History table closes.

4) Click the **Exit** button on the toolbar to return to the main menu.

Training Revisions

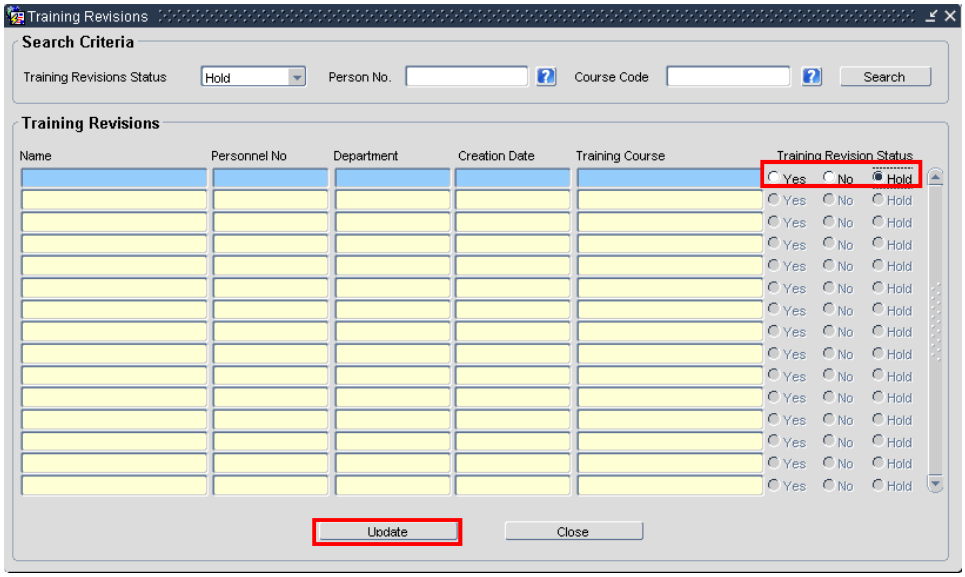
Training Revisions enables the Training Instructor/ Team Manager to indicate if the Training Element is to be assigned to the employee, not assigned to the employee or to be left on hold.

1) Click on the employee you wish to view training revision details for such that the employee's record is highlighted blue.

2) Select **Training Revisions** from the Select Detail menu on the Maintain On The Job Training screen. The **Training Revisions** table displays.

3) Amend the **Training Revision Status** indicators as appropriate.

4) Click **Update**.



5) Click the **Exit** button on the toolbar to return to the main menu.

Training Reports

Training Reports

A range of standard reports are available within Core Training (see table below). To run the reports select **Reports** → **Training Reports**.

Core Training Reports
Course Codes by Course Codes
Course Providers Report
Outstanding Training Reports • Outstanding Training Report By Course Code • Outstanding Training Report By Personnel No • Outstanding Training Report By Position
Position/Course Codes By Position
Reason Report
Training Course By Course Code
Training History Reports • Training History By Cost Centre • Training History By Course Code • Training History By Department • Training History By Location • Training History By Personnel No • Training History By Position • Training History By Work Group
Training Request Reports • Training Request By Cost Centre • Training Request By Course Code • Training Request By Department • Training Request By Location • Training Request By Personnel No • Training Request By Position • Training Request By Work Group
Training Schedule Reports • Training Schedule By Cost Centre • Training Schedule By Course Code • Training Schedule By Department • Training Schedule By Location • Training Schedule By Personnel No • Training Schedule By Position • Training Schedule By Work Group
Weekly Session Report

In addition to the standard reports available from Core Training a number of additional training reports have been developed in Business Objects. To access these reports please complete the application form attached to the web page below.

www.cardiff.ac.uk/humrs/staffinfo/informationmanagement/accessbo

Where an existing report does not meet your needs you can request a bespoke report be developed by completing the request form attached to the web page below.

www.cardiff.ac.uk/humrs/staffinfo/informationmanagement/requests

Glossary

Glossary

Administered By	The Department responsible for providing a course (e.g. Human Resources).
Competency Level	Where exam/ assessment scores are recorded, the competency level is the maximum score for the exam.
Course	High level details about the nature of the training being provided (e.g. objectives and description). Specific events are created against the course on each occasion the course is run.
Course Code	An alphanumeric code of up to 8 characters. It is recommended that the Course Code comprise of the 1st 4 characters of the Course Category followed by a 4 digit number (e.g. PERS0001 for the 1st course to be created using the Personal Development course category).
Course Category	The broad theme of the course (e.g. Personal Development).
Cut Off Days	The number of days prior to an event start date within which period employees and managers are prevented from cancelling a training request via Portal. A 7 day cut off period is recommended as a University standard.
Element	A distinct component of a course, particularly applicable to modular courses/ programmes.
Event	A specific occurrence/ instance of a course (i.e. each course is likely to have at least one event associated with it when the course was run).
Exemption	Enables a candidate to be excused from completing a course based on their previous training history or qualifications.
External Person	Used to setup candidates who are not members of staff (e.g. students, external guests, etc).
On the Job	Training typically delivered in the work/ job context and tailored to the trainee's needs rather than the more generic classroom based learning environment.
Scheduled Course	Training typically delivered in a classroom environment, as opposed to On the Job training.
Pass Level	Where exam/ assessment scores are recorded, this score indicates the pass level for the exam.
Pre-requisite	Where a candidate is expected to have a specified status on another course (e.g. completed or scheduled to attend another course)

	before requesting to attend the course that the pre-requisite applies to.
Provider	The organisation or person being employed to run the course (distinct from Trainer).
Recoupment Agency	An organisation from which the costs of running a course can be recovered in whole or in part.
Reference Data	Defines the options available from standard pick lists.
Register	Used to record the attendance of candidates at each element of a course.
Repeat Interval	The period in months after which a training request should be generated so that the candidate completes the same course again.
Repeat Training	Where a candidate is required to complete the same training course on a periodic basis.
Skills/ Training Matrix	A rules based framework which enables training requests to be generated automatically for candidates who meet those rules. Training requests will be generated automatically for staff who are new to the University or who change roles. A Training Requests Generation Report should be run to create a training request for existing staff.
Trainer	The person who delivers/ facilitates the training course. This may be the same as the provider (where the provider is a person) or different (where the provider is a company).
Training Request	Creates a training need for a particular candidate but where the candidate has not yet been scheduled a place on a specific course.
Training Type	Differentiates between Scheduled and On the Job training.
Question Category Code	A unique code used to differentiate between different evaluation questionnaires. A Question Profile is created against the Question Category Code.
Question Profile	A pool of questions that can be applied to one or more events to form an evaluation questionnaire.